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### **ABOUT HCAOA**

As the industry's leading trade organization representing home care agencies and their suppliers across the country, The Home Care Association of America (HCAOA) strives to provide member agencies with practical resources to enhance operations and margin and improve training and quality within our industry.

**MISSION** | The Home Care Association of America is the trusted voice of the home care industry, strengthening our members through advocacy, education and research.

**VISION** | Home care empowers all those in need to live their best lives wherever they call home.

**PURPOSE** | To provide leadership, representation, and education for the advancement of home care and provide a strong unified voice to speak to the issues of concern within the Home Care industry.

### **HCAOA MEMBER BENEFITS**



Access to over 20 sessions in our members-only Webinar Archive, with a new free Agency Momentum webinar each month.



Members-only discounts and codes from the innovative suppliers, vendors and services your business uses most often – like personal protective equipment and more.



Special members-only pricing for the HCAOA Entrepreneur Academy (read more on page 19).



Opportunities to network with your industry peers.



A voice on Capitol Hill and in state capitals across the U.S.



# MESSAGE FROM HCAOA Executive Director VICKI HOAK

As I sit and look out my window, I see the beginning of spring blossoming here at my home in Pennsylvania. Like many, I have been working remotely and must admit, I miss the hustle and bustle of Capitol Hill in Washington, DC. But the events of the past year have made our nation's Capitol a ghost town. But just as spring signals the rebirth of nature, so does it symbolize a restart for all of us and a reawakening of a city that has gone through a lot over the past year.

Of course, this optimism is fueled by more and more Americans getting the COVID vaccine - especially our frontline workers and clients. COVID cases are decreasing, CDC restrictions are relaxing, and President Biden has pledged that this Independence Day will be truly special, where we not only mark our independence as a nation but we begin to mark our independence from this virus.

In this issue, we focus on the heart and soul of homecare: our frontline workers who time and again prove their tremendous value to our organizations and clients. Today, and throughout the pandemic, we continue to advocate for home care workers to be recognized as essential health care workers, ensuring that they have access to paid sick leave, child care benefits and the COVID-19 vaccine. As we go to press, HCAOA is developing a position paper on issues included in the proposed American Jobs Plan, which highlights home care workers and the critical role they play in caring and supporting this country's aging population. Our conundrum is balancing this essential workforce's needs with the needs of operating a viable home care organization. We also must recognize the tremendous opportunity being proposed in the Home and Community-Based Services Access Act, which would mandate HCBS under states' Medicaid programs. With many caregivers still reluctant to get the vaccine, we have taken the responsibility to educate our workers on the benefits of the vaccine so that they can make informed decisions, with our ultimate hope of having all workers vaccinated.

The pandemic exposed the risks of congregate living, with two-thirds of COVID deaths occurring in nursing homes. Now more and more people are turning to home care as a safer option for long-term care and support, but many members report that they can't meet the demand because they simply don't have workers to fill the cases.

We dedicate this issue to caregivers, who every day bring care into the homes of millions of Americans who need help to remain at home living as independently as possible. The articles in this issue spotlight how home care organizations - both large and small have coped with this ongoing challenge. I urge you to read the articles and pause to reflect on how you relate to your frontline workers. Respect, dignity, recognition, inclusion and livable wages are just a few things that surface when we discuss recruitment and retention. The Home Care Association of America will continue to advocate for workers while we support our member organizations that recognize that our workforce is key to our future growth.

fire flore

## EDITION

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### How long have you been in the home care industry? What interested you in home care?

- Since June 2018. I started as a co-owner of Agape In-Home Care. I met my co-founder at a networking meeting and the topic of businesses that can make a social impact came up. He's a refugee from Rwanda and shared that most of the people in his church were caregivers and they love serving the elderly in the community, but they are also felt like caregiving was a deadend career path. We agreed that it would be powerful to create an agency that recognizes that most of our employees are multi-talented and might be interested in pursuing other careers. Agape was founded on the premise that we're here to serve the passions of our caregivers who will in turn take amazing care of our community's seniors.
- I am brand new to the industry. I signed with Homewatch Caregivers in August 2020 and opened in January 2021. I have always wanted to make an impact doing something where I can help people, create jobs and serve a purpose.
- I've been in the home care industry for five years. My great grandfather and grandpa started building 55+ active adult communities over 60 years ago. Then my dad came into the business of building 55+ active adult communities. With thousands of homes built for seniors in the Mesa, it was important for seniors to be able to stay in their homes that they had built and loved.
- My husband and I started the process of getting into home health care in March of 2020. We did a lot of research at the start of COVID, when being outside of the home was already starting to get unsafe for the elderly.
- I opened in March of 2020, just as the pandemic hit. I began this journey in the fall of 2019, so COVID was definitely not in the business plan.

### Did you come from another industry? Why did you make the switch?

- I retired from the Army after 20 years. I flew helicopters for the first 15 and did a little bit of everything you can imagine from fixing helicopters, flying combat missions in Iraq and Afghanistan, serving on a multi-national staff in Kosovo, to working with the Armies of our partners in North, Central and South America.
- My husband came from an environmental background, so this was very new to him. I grew up in a medical family and have been an Acupuncture Physician for over 21 years. We decided to be a team and help out the elderly as best as we could. Both of us cared for our mothers a few years back and know how important it is to be at home and have a sense of wellness and quality of life.
- I've been in many industries, but I owned a business in window treatments prior to home care for five years and then sold it. I sold window treatments mainly to the seniors in my dad's 55+ communities. I made the switch to home care after I sold the business and was ready to jump into another venture. I had no idea was I was really getting into.
- I worked in the investment industry for 26 years, primarily in research or portfolio management roles., When I thought about the best moments in my career, it was when I was working directly with clients. Knowing that someone trusts you and knowing that you have made a positive difference for them is just so powerful and satisfying. I was attracted to home care for both business and personal reasons. Personally, both of my grandmothers had been diagnosed with dementia, and had home care for years, before ultimately moving into assisted living facilities. I know how difficult the decision-making process is for families, as they struggled with the emotional and financial aspects of decisions.
- Yes, I've been in telecommunication sales, technology training, marketing and content development (with side businesses in acting, voiceovers and certified health coaching). I made the switch because I was on a journey to find a sustainable business that could return the triple bottom line of economic, societal and spiritual returns.



### Why did you decide to open the agency/why did you decide to open during the pandemic?

After being in the home care business for a couple years, there were a few things that really bothered me about the industry. Things that we couldn't do because of the boundaries in home care. We have had so many situations when we could be of more service to a family, but because we were "nonmedical" we weren't able. I never wanted to be in another situation where I wasn't able to help a family in the last few days of their loved one's life. So, amidst the pandemic, I started Sunland Medical, which is a home-based medical company. We now have a medical director and several nurses on staff. This has been so rewarding, again, to assist our seniors to stay in their homes as long as possible while we provide medical care and geriatric care management for them.

I really feel that the home is the safest place right now for our clients. I also think healing always takes place in the home and the success rate to get better and move forward is better in the home.

It fulfilled several important requirements.

- 1. Serving caregivers
- 2. Serving seniors
- 3. Co-founding it with someone of another race to show diverse leadership
- 4. Creating a for-profit business that can be mission-minded and not focused on profit
- 5. Creating a platform model for opening future caregiver/ senior-centered businesses





### What have been some of the challenges of operating your business during the pandemic?

- The biggest challenge has been finding experienced caregivers among the pool of people wanting work but that are not qualified. The other challenge is competing with government programs incentivizing people to stay home. Caregiver hiring is a challenge no matter what, and much more so now than ever.
- Getting our caregivers to stay healthy and committed, and since children have been home caregivers are finding their time management difficult to maintain. Also teaching and courses have been online and many of our caregivers do not have the ability to use Zoom or go online except on their phones. We want to have barbeques, recognition Saturdays and check-ins but the pandemic has made this impossible.
- By its nature, this is a very challenging business. The pandemic makes everything more difficult. Referrals from doctors, facilities, rehab centers and others are very important to our business. Hard to make these sorts of connections when you cannot visit people in the office; you couldn't even go out and grab a cup of coffee. The pandemic also hit the workforce very hard. We had employees unable to work, often because their childcare disappeared with schools and afterschool programs closed. They had no one to take care of the kids.
- Losing 30 percent of our revenue within a month of the start of COVID was a huge challenge. The economic disparity of what caregiving costs in our area with high minimum wages and what people can afford is a difficult challenge because it leads to clients wanting short shifts and caregivers refusing short shifts because there is such a high demand for their services.
- There have been so many challenges operating the business. First of all, I had just beaten breast cancer the prior year. I was still feeling weak, exhausted and dealing with my own mental health issues from that trauma. So, going into the pandemic was especially difficult for me. Things happened so fast and so suddenly, and there wasn't a lot of information and it kept changing. All at the same time, I was trying to get my office staff set up to work remotely, support and educate the entire company, write new policies and procedures and assure the clients we were there to support them and that we were taking this very seriously. It was a very difficult time. We lost about 40 percent of our business early on in the pandemic. And then about three months later, people realized that COVID-19 wasn't going away and they needed a caregiver again.

### What tools do you utilize to professionally develop your workforce?

- In our company culture, we are continuous learners. Several times a week we watch Darren Hardy's Darren Daily and have a discussion around those short videos. We have also completed Darren Hardy's Insane Productivity Course and attended the High Performance Forum. I ask my team what are their goals professionally and work with them and support them on completing those goals. We have two certified CADDCT on our team, who have then trained certified the office staff as Certified Dementia Practitioners. In Arizona, you don't have to offer paid training to the caregivers. We offer paid training several times a month on a variety of topics that our team is interested in or areas that we need to improve. Currently, the University of South Florida has put together a training called Equity and Inclusion in the Workplace Certificate Program. Several team members are participating in this training as we work to understand diversity and emotional intelligence better, which is so key in our line of work.
- We conduct an extensive vetting process from applicant review, interview, onboarding, orientation and assigned training. We highly encourage the use of our online university beyond assigned training to promote advanced learning opportunities for our caregivers.
- We wanted to create a family type atmosphere with our caregivers and let them know we are here if they need us. We recognize them for their dedication like children's birthdays, or sending them care packages if they get COVID. We try to show them we value everything they do through awards and recognition. This has been difficult during the pandemic as social gatherings have been zero. We have a four- to six-hour orientation where we go over skills, client care, emergency management, first aid scenarios, teaching on dementia care, companion care and personal hygiene. We also go over different menus and cooking skills and have lessons on basic cooking and meal planning and food groups.
- I love it when a caregiver wants to go to nursing school or get a certification. Caregivers come from all over. Many of them started by taking care of a family member, a parent or grandparent, and decided to make it a career. These are people who care about others. Skills can be taught. An orientation to caring and service is innate. It also really helps to have a big personality.
- While we are a technology-based agency (paperless), I don't think of our tools for workforce development so much as I think of our workforce as how we develop our workforce. The Bible says, iron sharpens iron and so we also sharpen each other. Agape's office staff are made up of former caregivers and healthcare industry workers who can relate to our frontline workers even to the point of speaking some of their native tongues...

"...We figure that someone who is doing a job as a means to an end will perform that job 100-times better than someone who sees it as a dead-end job because they see purpose in what they are doing and they have hope for the future. Therefore, we give zero-interest loans to those who need it to pursue higher goals such as education."

-Tim Cooke



### What would you say are the keys to creating a good company culture?

- Being honest, loyal and treating each person with dignity and respect. Above all having integrity in what we do, day in and day out. This extends to our caregivers as well as our clients.
- Recognizing that our caregivers are essential to keeping this industry running. They need to be paid a living wage and this is not happening for them.
- The most important thing in developing a good company culture is that the leaders have to model the right behavior. We care! Our employees have to see us care. We are very hands on with our clients, visiting them often, helping the caregivers work, even filling in if a caregiver could not make a shift. We also do a lot for our clients. We help coordinate doctor and VNA visits, facilitate telehealth calls, work with pharmacies to get medicine and supplies delivered. Our caregivers see this and participate in the process. Watching the owners get their hands dirty (sometimes literally) says more than any words that we can utter. We also have 12 hours of paid training annually. We can do this online or in person. We have been mostly online given the pandemic, but we still do an initial four-hour in-person orientation before a caregiver sees a client. We have done in-person training with one of the local hospice organization and have others scheduled for the coming year.
- Prove that you care with your deeds and not just your words. Allow your staff to help shape the culture. Empathize with what your staff are going through and adapt when possible to their needs.
- Early on in the business, I came across a quote by Richard Branson. It says, "Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients." Our team comes first in everything. Every decision I make, I think about how it affects our them. I fundamentally believe that when we are in a line of work that is fulfilling and one that we are passionate about, generally, we are happier. Other things I'm really cognizant of is incorporating into our company culture our mission statement and core values into everything we do. I try to model the behaviors that embody our company culture and when I break the rules, others are empowered to call me out. Our culture is one of showing vulnerability—where it's ok to be to be your authentic self. I tell my team all the time that I don't have all the answers. I really try to hire people that are smarter than me and then get out of their way so they can do their job. Our culture is one where it's okay to fail. All I ask is that you learn something from it and try again.

## Strategies for Conquering the **Caregiver Recruiting** and Retention Crisis



By Stephen Tweed, CSP **CEO of Leading Home Care** 

### **ABOUT THE AUTHOR:** Stephen Tweed, CSP, is an

award-winning professional

speaker, industry leading home

care business strategist, and published author. He is the CEO of Leading Home Care...a Tweed Jeffries company based in Louisville, KY, and Founder of the Home Care CEO Forum. Stephen leads four industry mastermind groups for companies in the top 10% of the industry and provides Strategic Coaching for individual company owners. He is the Author of Conquering the Crisis: Proven Solutions for Caregiver Recruiting and Retention and founder of a new program in 2021 called Caregiver Quality Assurance. In 2019 he was awarded the first annual Home Care Industry Leadership Award by the Home Care Association of America. He can be reached at www.homecareCEO.com or www.caregiverquality.com.

What's the biggest barrier to growing your home care business? A shortage of client inquiries? An Ineffective sales process?

A poor relationship with referral sources?

No.

The biggest barrier to growing your home care business in 2021 is conquering the caregiver recruiting and retention crisis. There are simply not enough caregivers to meet the growing demands of an aging population.

The "Top 10% Home Care Mastermind Group" was formed in 2015 by companies doing 1500-3500 hours of service per week who want to be in the top 10 percent of the industry. My experience with this elite group shows that the largest companies are still growing despite the caregiver shortage. What are they doing that smaller companies are not?

### **Find Higher Quality Candidates**

In a conversation with the owner of a very large home care company, he told us that of his 12 offices, nine of them had grown hours in 2019, and three were flat or down. In looking at the data, he learned that the three offices that had not grown also fell behind in the number of qualified caregiver applicants. In his analysis, there is a direct correlation between the number of qualified applicants and the growth in hours of the business.

To find higher quality applicants, you need to take a three-pronged approach to recruiting:

- 1. Online and Digital Recruiting By far, the number one recruiting source is Indeed.com. However, our data show that candidates coming from Indeed are most likely to turn over.
- 2. Employee Referral Program The most effective way to find high quality applicants who become high quality caregivers is from your own employees. Data show that caregivers hired this way stay longer.
- 3. Face to Face Recruiting in the Community Most agencies in the time of COVID have stopped going out into the community to recruit. Still, our data show that applicants from CNA schools, home health aide training schools, and four-year schools of nursing make great caregivers.





Take these principles and test them out with different job ads. Track the results from each ad you run, and each recruiting source you use. Analyze the data to find out which placements get the largest number of high-quality applicants.

2

### **Hire More Full Time Caregivers**

Several years ago, our Top 10% Mastermind Group was visiting a member of our Top 5% Mastermind Group. The CEO of our host company made an interesting comment:

### "Full time caregivers with benefits don't quit."

That was quite a bold statement, and it got the attention of the members of the visiting group. They did a little survey to find out what percentage of their caregivers were working full time—more than 35 hours per week. The answers were across the board. One member found that over 50 percent of her active caregivers were actually working 15 hours a week or less. In another survey of mastermind members, we asked about the average hours per week per client. We discovered that the larger, faster growing companies averaged more than 30 hours per week per client. The highest number comes from one of our members in California who averages over 90 hours per week per client.

When your clients are using more than 35 hours per week, you can keep your caregivers working full time without having to work with several smaller clients. More research shows us that when a caregiver is working the number of hours per week they want to work, and they achieve that by serving one or two clients, they tend to stay with you longer.

### **Keep Your Caregivers Longer than 90 Days**

One of the lessons we learned several years ago from the Home Care Benchmarking Study from Home Care Pulse is that about 80 percent of caregiver turnover happens in the first 90 days.

Caregiver turnover in home care hit an all-time high of 81.6 percent in 2018. Turnover came down a bit in 2019 to 64.3 percent. We don't think that is a reversal of the trend, but an anomaly. We'll see.

This data means for every 100 caregivers working in home care, 64 of them quit or were fired. How can you possibly grow your business when most of your recruiting effort is going to replace the churn of turnover?

The other big lesson we learned from the annual Home Care Benchmarking Study is that 81 percent of turnover happens in the first 90 days of employment. If you could reduce your 90-day turnover you could use more of those new caregivers you are hiring to serve new clients.



To learn more about the facts and data related to caregiver recruiting and retention, dive into Home Care Benchmarking Study from Home Care Pulse at www.homecarepulse.com.

To learn more about how other companies your size are conquering the caregiver crisis, explore becoming a member of a Caregiver Quality Mastermind Group.

There are three big factors in improving your 90-day retention:

- 1. Hire the Right Applicant in the First Place Research from our Caregiver Quality Assurance Program shows clearly that when you do a better job of selection, and hire applicants who are a better fit for the caregiving job, they stay longer, are happier on the job, and get higher client satisfaction scores. Too many home care agencies are so desperate for caregivers that they hire anyone who can breathe on a mirror. Then they are frustrated when 60 percent of them leave in the first 90 days. When you do a better job of finding applicants who are a good fit for the job, and a good fit for your company, they stay longer and perform better.
- 2. Keep New Caregivers Working the Hours They Want One big cause of 90-day turnover is new caregivers who aren't getting enough hours, or who lose a case and are not scheduled for a new client quickly enough. That new caregiver you just hired and put out on her first shift is not yet on the radar of your schedulers. As you know, they call the caregivers they know, and often don't call the caregivers they don't know. If you want that new hire to stay with you, make sure they are on the radar of your schedulers and are getting the hours they need and want.
- 3. Stay in Touch and Make them Feel Valued and **Appreciated** – Our research on the best caregivers shows that good employees will stay with you when they are doing meaningful work, and when they feel valued and appreciated. Specifically, best caregivers want to feel valued by their clients, valued by their supervisor, and valued by company leadership. You can keep new caregivers past 90 days by having a system to stay in touch with them, learn about them as a person, and help them feel like they are a valued member of your home care team.

### **Grow Your Business by Improving 90-Day Retention**

The larger companies in our Home Care CEO Mastermind Groups who have focused on improving 90-day retention are seeing measurable improvement in company growth. There are several positive things that happen when you focus on improving 90-day retention:

- You have more caregivers already available to accept
- Your recruiting efforts result in more caregivers and you can take more clients.
- Your clients are happier because they get to keep the same caregiver. The number one thing clients want is "continuity of care." They want the same caregiver every time.



Behind the leading homecare system, is a dedication to developing secure technology solutions that support improved quality of life for recipients of in-home care.

- **Sophisticated and secure technology** you can count on, day in and day out.
- **Comprehensive communication tools** essential for improved health outcomes and quality of life.
- Accurate records for streamlined operations allowing you to gain control and grow your business.

To learn more about
Generations® or schedule
a live demonstration, visit
HomecareSoftware.com.



## IN THEIR Own Words.

We asked caregivers to answer why they chose home care and what factors makes them stay with their current agency. Thank you to everyone who sent in their story!

We had an overwhelming response - so if your quote is not listed this time, stay tuned.

> I am a caregiver because I have a passion to help those in need. Clients that are added on my daily schedule aren't just clients, they're real people that I get to help during the day and build a relationship with. I want my clients to smile and know that they are loved and cared for. Seeing them smile, laugh, and feel loved gives me the strength and motivation every day. I work for an agency called HomeJoy located in the Kalamazoo area, and they have been wonderful! My boss and owner, Dan Story, teaches all the aides the core values when starting their journey with HomeJoy. The one core value he really talks about is caring. He breaks down caring into different levels that I never thought of before, and teaches us the levels of caring for the job and on the job with our clients. That's one of many things I love about HomeJoy, caring is the agency's first core value.

> > -Hannah Hendriksen HomeJov Michigan

My caregiving experience has been with me since the day I was born. My mother was the owner of two Alzheimer's and dementia care homes. Some of my first memories as child were spending time with her clients and playing with them. As I grew older I wanted to participate more and more as I watched my mother change people's lives from giving them quality care, patience, compassion, and most importantly making them smile and feel at home. I have chosen to stay with Pacific Home Care Services for the past 2.5 years because they care about their employees. I've never worked for a company that has thrown so many fun events such as tickets to Six Flags, holiday events, raffles, and birthday cards. They also provide paid mileage and sick time for their providers. Pacific Home Care Services has also given me to opportunity to elevate my career to be part of the administration team as a Service Liaison. Pacific Home Care Services has been a blessing for me in many aspects of my life and I am grateful to provide blessings to my community members.



-Korenna Yang Pacific Home Care Services California

I just knew it was my calling. I cared for my grandmother and great aunt until their passing, and I believe they're with me every day encouraging me to pour the love, care and passion I have for this work into the lives of my clients. Advanced Healthcare is beyond amazing. They have always been one of the greatest support systems I could ask for. Always offering help, advice, guidance and one-onone training when needed. I've never felt alone when tackling an issue, or after the loss of a

I became a caregiver at 19 years old because

beloved client. It is an incredible feeling of not just having a 'job', but the feeling of being a part of a company that takes you in like family.

> -Miranda Untalasco Advanced Healthcare Washington



I love to help people in need, giving my time and making people smile every day makes me happy. That's my purpose in this life—creating a good, safe life for the people who gave so much, and giving them time and attention is my everyday goal. The reason that I stay with my agency is because they are like me, caring, compassionate and focused on the wellbeing of the person regardless of their race, religion and social status. We all deserve to have our life comfortable and Gentle Care makes us feel at home.



**-Yolanda Martin**Gentle Care Home Health
Illinois

I am a caregiver because I enjoy helping people. Aside from the good feeling I get to experience knowing I am making a difference for my clients, I am receiving quite the education in history, philosophy, spirituality and human relationships from my clients as well. I feel very lucky to have met the people I have met through Comfort Keepers. I stay with Comfort Keepers because I love every one of my clients and couldn't imagine not seeing them regularly. I also stay because Janet Scott, who works in the Comfort Keepers Grayslake office, is so good at what she does and keeps everything running as smoothly as possible. She is a wonderful person who deserves many, many accolades!



-Shannon Leahy Comfort Keepers Illinois My passion is helping others, especially homebound clients who need caring companionship! My employer is honest, available and supportive; and our staff meets and exceeds expectations in dealing with daily needs of our clients and caregivers!



-Rachel Hubka Right at Home Illinois

I am my happiest when my work is fulfilling, and the most fulfilling work for me is when I'm generally able to help others, and specifically to assist families of children with special needs. 24Hour HomeCare is a company where I feel supported—the coordinators are friendly, accessible, and accommodating. Also, I've never felt so recognized or valued for the work that I do than with this company.



-Aria Geller 24Hour HomeCare California

I am a caregiver because I like working with the clients that have different needs. They become like my family. I'm able to hear all the stories from back in the day of the older people that I have worked with. My major is nursing in school, and once I started as a CNA I knew that nursing was the fit for me. Everyone is super nice in the office and always willing to work with my schedule due to college classes. They always encourage us and are always willing to help when we need them. I know I can count on them for any of my client's needs.



-Latonya Higginbotham

Beyond Care

South Carolina

## **NOT JUST A** WORKFORCE, **BUT A TEAM:**

A New Approach to **Workforce Development** 



Pattie Rogers is the Vice President and Director of Operations for Waverly Care Associates in Gladwyne, Pennsylvania—an agency with a great reputation and low turnover rates among caregivers. Originally trained as a social worker, and also with a business background from her work with the American Red Cross, Pattie started in the home care industry as a direct care worker herself, looking for a part-time job after the birth of her second child. This experience gives her an edge when it comes to developing and managing her workforce of over 240 caregivers. She truly understands her workers and the importance of creating a culture of mutual respect.

### **KEYS TO WORKFORCE DEVELOPMENT**

### RESPECT

"The overall umbrella is respect" Pattie explained. Everything must stem from respect. For example:

- Paying as respectful of a wage as your agency can afford.
- Treating people with respect and as the professionals that they are their role is a professional career.
- Getting to know your workers and their families. Which also includes trying to understand their dual responsibilities at home—for many caregivers, taking care of others does not stop with clients. They also take care of family members and children.

### CONNECTION

In home care, one main challenge is that workers can feel disconnected. Pattie stressed the importance of each team member feeling like they belong to a team. Since caregivers don't regularly go into a shared workplace to interact, chat, and build co-worker relationships, feeling part of the team is especially important. One example of how Waverly combats this issue is (when not in pandemic) to have the same group of five caregivers come in for their annual training together. This helps these five people make a connection and creates a culture of belonging. Pattie says this connection is what helps keep turnover low. In addition, when a company culture is strong and everyone is a team, workers have pride in the agency and want it to be the best. Caregivers want to be part of a team with a great reputation in the industry.

In addition, when people love the team they work with, they attract others to the program. Pattie mentioned that she does not advertise her recruiting efforts. Her employee referral program is really booming—her workers bring their friends and relatives into the business, which is a testament to a great environment.

### RECOGNITION

There are a variety of ways to keep your workforce happy and engaged, and Pattie has found that one of the biggest ways is through recognition. "Recognition is huge. Public recognition is huge—recognize people in front of their co-workers, and do it every day if you can." A few simple ideas Pattie utilizes are writing handwritten notes for her workers, sometimes including gift cards. She makes sure to pass along compliments from clients as well. "Many people don't get a lot of thanks."

Finally, when asked what qualities in a person make a good caregiver, Pattie mentioned the following: patient, optimistic, passionate, dependable, kind and happy!



## Think Like an Entrepreneur 5 Tips to Help You Thrive During Change



If 2020 taught us anything, it's that possessing great change strategies is the key to success! Change is far from over—COVID redefined the healthcare industry. Learning a few helpful tips about change goes a long way towards not just surviving, but thriving. As an educator, here are a few of the tips I utilize to thrive through change.

- Be in the Know: Even though every person is unique, we are predictably unique. Certain behavior patterns will reliably show up within similar people. One useful tool for better understanding behavioral approaches is the DISC\* assessment. The DISC model helps you understand how individuals react in different circumstances, challenges, and change. (Pretty much the entirety of 2020!) Not only is this helpful knowledge in your personal life for self-awareness, it's an invaluable asset as an entrepreneur. Knowing how others react to change keeps you in control of the process.
- Shrink the Change: Many individuals' knee-jerk reaction to change is avoidance, aggression, or indulgence. Netflix and cookie dough can only take you so far before a better strategy is necessary. Change can seem impossible at first glance. This often comes as a result of looking too far into the future, squinting toward the end goal rather than focusing on the next step. Keeping the big picture in mind is certainly important. However, breaking down change into small, manageable pieces minimizes the perspective in a good way. Shrink the change, reduce the fear.
- Connect the Dots: Let's be real, we've all been in the place where we question our motivations. Our emotions can play tricks, lie to us, or hijack the process of navigating change. When we begin to understand the behavioral style in ourselves or others, we're able to pair the activities associated with said change to the things that actually motivate us. Connecting what drives you most to the change at hand will significantly affect the outcome.
- Stop Doing: What tends to be your go-to method when life throws a curveball? Perhaps, you freeze in a gridlock of grimacing despair. Maybe you tackle that beast head on. Whatever your natural approach, I like to begin with a "stop doing list." Let's face it. None of us have time to add more onto our plates—especially during a pandemic. Instead, identify the things you can control and seek to remove one of those things from your plate. When we stop what we're already doing, it releases a space to receive more.
- **Pull vs. Push:** Sure, a gentle shove toward change might be faster, but the results are usually not realistic or sustainable. Pulling ourselves or others along during the change process often requires a slow, focused, even humble approach. However, it allows for more participation, empowerment, and potential solutions.



By Tonya Miller TYM Coaching, LLC

### **ABOUT THE AUTHOR:**

Dr. Tonya Miller, an assistant professor in the physical therapy and MBA programs at Lebanon Valley College, and the founder of TYM Coaching. Dr. Miller has over 25 years of experience in leadership, home care, and as a physical therapist. She will also lead the new HCAOA Entrepreneur Academy. You can find more information about the program at www.hcaoa.org.

### **NEW:** HCAOA Entrepreneur Academy

A six-month course with over 30 hours of education at your convenience and on your schedule.

Fee is \$1,200, but HCAOA members receive a discounted rate of \$999.

Email info@hcaoa.org or visit www.hcaoa.org for more information!

Registration is open until June 15.

### Want to learn more?

I dive deep into strategies like managing complex change in the new HCAOA Entrepreneur Academy. I designed the academy with the healthcare entrepreneur in mind. The academy provides a flexible and personalized approach to key strategies that help develop you, your team and grow your business.

<sup>\*</sup>The theoretical work of William Marston, M.D., as published in Emotions of Normal People (1928), is the foundation for the current DISC model.

## **IMAGINE** Initiative

Will Allow Foreign-Born Workers to Meet the Growing Care Needs of a Rapidly Aging America

Recruitment and retention of older services workers has been one of the most pressing challenges confronting home care providers. Demographic trends, along with a rapidly aging population and fewer people of working age, fewer informal caregivers and insufficient number of American-born workers have added to the workforce crisis.

The pandemic further exacerbated the workforce shortages long-term care providers were experiencing prior to COVID. Additionally, it's important to point out COVID not only took the lives of over 342,000 older people but also the lives of thousands of healthcare workers, including aging services workers. Many of the workers also got sick and had to isolate. Others had family and childcare responsibilities, and several were simply burned out.

### Advocating for IMAGINE Policy Recommendations in Congress

Aging services providers have long advocated for domestically-based solutions to the longterm services and supports (LTSS) staffing crisis. Unfortunately, there just are not enough people born in this country entering the aging services field to solve the workforce crisis. Solutions should feature a targeted set of policy recommendations aimed at engaging foreign-born workers in our efforts to meet the growing care needs of a rapidly aging America.

Specifically, the IMAGINE (International Migration of Aging and Geriatric Workers in Response to the needs of Elders) Initiative would:

- Enact an 'H2Age" temporary guest worker program for certified nurse aides (CNA) and home care aides.
- Expand the EB-3 visa program to allow more foreign-born direct care workers to enter the U.S.
- Modify the EB-3 visa to increase the number of visas available specifically to address LTSS needs.
- Modify the R-1 visa program to provide religious visas to temporary workers in faith-based organizations.
- Enact "Carer Pairer," a new authority under the J-1 visa program, to include aging services workers in addition to child care workers.
- Amend the North American Free Trade Agreement (NAFTA) to include aging services workers.
- Increase the number of refugees permitted to enter the U.S. and take steps to employ those refugees in the LTSS sector.



The IMAGINE Initiative offers a path forward for policymakers that lays out policy recommendations, pursuable alone or as a package, which make changes to the current immigration laws and allows aging services providers to fill available positions. Shortly after the release of the plan, LeadingAge shared the initiative with members of Congress that had jurisdiction over immigration reform and workforce issues. LeadingAge also looked for opportunities to amend immigration legislation that were being considered, targeting proposals that addressed "less skilled" workers which typically allow aging services providers to employ direct care workers, including home health aides, certified nursing assistants and personal care aides.

The House-passed Health and Economic Recovery Omnibus Emergency Solutions (Heroes) Act included provisions that would temporarily ease certain immigration-related restrictions to allow immigrant physicians and other critical healthcare workers to assist in the fight against COVID. Unfortunately, these provisions were not added to the final version of the bill that was enacted into law.

### Efforts to Influence Immigration Bills with the Biden Administration

For the first time in years there is new hope that immigration legislation can pass through Congress. President Biden has established immigration reform as a priority, and he has sent a comprehensive bill to Congress to consider. The President has also given the Secretary of Homeland Security, in consultation with the Secretary of Labor, the authority to increase the number of H-2B temporary immigration visas that allow U.S. employers to fill temporary nonagricultural jobs, when there are not enough U.S. workers who are willing, qualified and able to perform temporary nonagricultural labor. The prospective workers could be employed as short-term personal care aides, home health aides and nursing assistants.

Imminently, the House will begin action on both the American Dream and Promise Act, which creates a pathway to legal status for "dreamers," undocumented individuals who were brought to the U.S. as children and the Farm Workforce Modernization Act. These bills are separate from President Biden's comprehensive immigration plan, the U.S. Citizenship Act of 2021, which increases the annual number of immigrant visas for lower-skilled jobs from 10,000 to 40,000 – that could expand opportunities for people to obtain green cards to work in aging services.

### How Can HCAOA Members Help This Initiative?

We encourage member agencies to collect stories of how immigration reform can assist the challenges faced by home care providers in your state.

HCAOA members can also ask their members of Congress to request that foreign-born workers, who already play a valued role in the LTSS field, be a part of the next COVID-19 economic recovery proposal that will include investments in infrastructure and provide supports for essential health care work and economic fairness. A bill has yet to be introduced in Congress however this is the next phase of recovery that we expect from the Biden Administration.

HCAOA, alongside other senior advocacy groups like LeadingAge, are striving to work collaboratively to ask members of Congress to sponsor legislation that creates a new visa category to address our workforce challenges in long-term care, as identified in IMAGINE.

Thank you to Andrea Price-Carter, LeadingAge, for contributing information about the IMAGINE initiative.



## Structuring a Strong Compensation Plan that **Makes Your Staff Want to Stay!**



By Gabrielle Hoing, Owner Kore Cares In-Home Care, Sioux Falls, SD

#### ABOUT THE AUTHOR:

Gabrielle Hoing (Gabby) has been working in healthcare for over 15 years. While in high school she started a position as a certified nursing assistant (CNA) and medication aide in a long-term care facility. This is where she realized that she loved caring for people. While attending USD for a business degree in health services administration, she began working

in home care as a caregiver. Following college, she worked for one of the nation's largest not-forprofit senior care organizations and they tasked her with starting their first private duty home care agency in Sioux Falls, SD. After seeing how other companies approached home care, Gabby had a strong desire to start a company that was different. That is how Kore Cares was born. Kore Cares' mission is to empower individuals to use their God given gifts and talents to serve those in need. Kore Cares strives to develop relationships with their clients and employees and be involved in their lives in a meaningful way while still providing an exemplary level of professionalism.

I am sure you have heard the adage, "what gets measured gets managed, what gets rewarded gets repeated." Now envision your ideal employee. Maybe this exemplary employee is always on time, perfect attendance, great personality, is not only good at companionship but also household chores and personal care. How do we as home care leaders set expectations for staff, measure and track that these expectations are being met and reward those for achieving our ideal results so that they get repeated?

Having worked in healthcare for about 17 years, 12 of which in leadership positions, I have been experimenting with various ways to compensate staff to achieve specific results and retain good workers. We do not have a perfect system. It is ever evolving as our workforce changes and our needs change, but my goal in sharing what we do is that it will inspire you to get creative with your compensation and find a way to reward and retain great staff.

### The system we have built helps us achieve a few things:

• It sets clear expectations

- It rewards those going above and beyond
- It is fairly easy for office staff to track

When I started my career in the health care industry, first as a CNA and then a home caregiver, I noticed the following: First, raises and reviews were inconsistent and rarely on time. Second, I would happily skip a break to help someone in need. I worked hard because it was the right thing to do, but the pay structure was the same for the most hardworking staff member as it was for those who dodged tasks and took frequent breaks.

It is defeating for hardworking staff to see others get the same pay and recognition as they do. As leaders we have that voice in the back of our heads saying compensation has to be fair—and the simplest way to be fair is with annual increases. Fear that we will be called out for unfairness has stopped us from being innovative with our compensation packages, but it shouldn't.

### From Experimentation to Success

I have experimented with a variety of ways to reward those who go above and beyond. I started with a simple point system. When someone was caught going above and beyond, they were given a certificate that identified the ways they went above and beyond and the number of points they received. The office staff had a binder where they would keep track of each employees' points. Since our staff would not come to the office frequently, we would mail out these above and beyond certificates. This system worked, but could have been better. We were rewarding employees for going above and beyond but employees often forgot about their points. Sometimes we forgot to mail the certificates or they got lost in the employees' mailbox. We retired the point system and have moved on to something a little more structured.



Today our bonus structure has five categories we reward employees on, including: client satisfaction, team work, attendance, adhering to our policies and procedures, and job performance. Employees receive a review every 90 days, are evaluated on these categories and have the opportunity to earn up to a \$300 bonus depending on how many categories they meet and how many hours they work. The following is a summary of each category and how we track performance in each area.



### **Client Satisfaction**

Any time a client calls the office with a compliment it gets documented in ClearCare and tagged with "client compliment." We can easily pull these tags to be reviewed before evaluation.



### **Team Work**

It is important to us that team members pitch in when another team member has an unexpected illness or emergency. We document caregivers who are flexible with their schedule and pick up shifts last minute. We also document any compliments the employee receives from co-workers.



### **Attendance**

We have a point system and 0-3 points in the look-back period meets this category. We also track if employees are only texting in for shifts—we require a call if they cannot make it to a shift.



### **Corrective Action**

It is important the employees are fulfilling their job duties and following agency policies and procedures. If any employee has a verbal, written or final warning they will not be eligible for a pay raise or bonus.



### **Job Performance**

This category is evaluated on their most recent supervisory visit review as well as a few key job expectations that are important to our agency.

We also consider number of hours worked. The amount of the bonus is based on number of hours worked and number of categories met. For example, someone who meets all five categories and works an average of four hours a week will get a \$50 bonus, whereas someone who works over 35 hours a week and meets all five categories will receive a \$300 bonus. We perform reviews every 90 days and give raises every six months.

It may sound like a tedious process, but we know that "what gets measured gets managed, and what gets rewarded gets repeated." If we have certain expectations, we need to measure them and reward those going above and beyond if we want to keep getting those results and retain the high performers.

In addition to a bonus program, we have a very clear wage grid, we make sure reviews are timely, and we survey our employees at least once a year to obtain feedback on our compensation program. We take the feedback from these compensation surveys and make improvements to our system and make sure we communicate to our employees how we tweaked things based on their feedback.

Think creatively about how you can measure performance and reward employees. Your agency will be able to achieve the results you aspire toward.

## LEADING PEOPLE IN THE **EXPERIENCE AGE**



By Ed Krow, Founder & HR Strategist Ed Krow, LLC

### ABOUT THE AUTHOR:

Ed is the Talent Transformation Expert for businesses looking to achieve eight figure growth. He delivers captivating, highenergy keynote presentations that challenge the traditional model of HR and prepare decision makers for motivating their people with a win-win strategy. In his career, Ed has helped over 250 clients, including Fortune 500 companies, achieve talent and culture transformations. Ed is a member of the National Speakers Association, the Forbes Coaches Council, and a regular contributor to Forbes.com. He is the author of "Strategic HR: Driving Bottom Line Results Through Your People". When he's not on stage or helping clients, Ed teaches at Millersville University. His first love is family, with golf vying for a tight second. If you do catch him at home, he's likely cheering for the Notre Dame or Baltimore Ravens football teams. You can contact him at 717.314.3680 or

Think we are in the Information Age? Think again. We're now in the Experience Age, an age when people are moving toward connecting their experiences and moving away from simply focusing on informational facts.

It's a shift from the features and benefits of technology to the life experiences that tech allows us to live.

Employees of the experience age expect the same from their employers. If it doesn't help them grow and experience more of who they are, they don't want it.



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### Is there a talent shortage?

My clients tell me there are plenty of people out there, but not the people they want or need. The solution could be right before your eyes. Look inside your business, your people, and yourself.

Are you looking through Information Age era eyes—or maybe even Industrial Age eyes? You need to look through Experience Age eyes.

This means a shift from employees identifying as having a role in your organization to the organization providing a role that helps the employee express who they are. Can your current culture withstand this coming tsunami? Want to learn how to prepare for and adapt to this coming surge in employee expectations and ensure that your business can thrive in the new environment? A simple shift in mindset will reveal a wealth of talent right before your eyes, and you will see what you need to hit your targets, realize your vision and break through revenue ceilings. It's easier than you think.

The biggest challenges all companies face, especially those that are growing, are things like recruitment, effective management, and implementing their strategy. I see companies every day who are struggling because the "people" equation" is out of balance. The employment relationship is simple: we hire the best and the brightest and reward our people for driving business results. However, when the rewards don't match the expectations, performance suffers, and turnover ensues, and then your employment brand begins to falter.

### Case Studies

For instance, consider the \$55 million medical practice that could not recruit and retain qualified medical staff. The doctors and owners were looking to expand and build a new campus across town. However, human resources couldn't keep up with the current hiring and many employees refused to refer their friends to work there. Fortunately, the CEO had a vision and brought me in to help. We set up a new recruiting strategy that tied the business goals, we set up a new structure for the human resources team to ensure the right people were in the right seats, and finally we retrained the entire leadership team on the new process and drove accountability through the organization. The result? Time-to-fill went down. The new campus opened on time. Employees are beginning to believe in the employment brand again. Can you say ka-ching? Huge money savings resulted and we saw employee satisfaction increase as a bonus.

If you try to use recruitment and motivation tactics from the Information Age, you're going to likely be unsuccessful—and it's going to cost money while you risk losing people working at their best and brightest.

Unfortunately, not every story I have is a success. A national snack food manufacturer called to express concern that one of their plants wasn't performing as well as the rest of the organization. I had delivered results for them on previous projects and they trusted me. As we reviewed the challenges at this facility, I began to see how we could solve the issues and we laid out a course of action. This organization was losing approximately \$1.5 million per year on the issues in this facility. When I delivered my outline, the response was, "Ed, we love what you've outlined and we know it'll work, but we don't have the project in our budget for this year." This company saw the solution, one that would cost a fraction of the ongoing losses and one that would begin paying off in savings after about 18 months, but they didn't want to spend the money to fix the issue. The explanation for why a decision like that would be made? Complacency.

Complacency has no place in the modern marketplace. That's why brands like Xerox, MySpace and Yahoo failed to maintain marketplace clout using their outdated, out-oftouch approaches. When businesses keep an open mind to evolution, they're able to pivot, adapt and change course with more agility than their stagnant counterparts. This enables them to keep up with modern innovations, consumer mindsets, and employee expectations to ensure they don't suffer extinction like so many brands before them.

If you are not hitting revenue potential, growth targets, talent attraction and retention, it's time to get off of complacency island and back over to evolution island where three big things are happening: Market share is increasing, competitive edge is taking root, and brand reputation rules.

If your team isn't firing on all cylinders, it's time for a tune up.





seat into the complexities

and challenges of the

front-line labor market. Her

expertise helps healthcare

organizations understand

and rethink recruitment and

retention strategies.

As COVID-19 swept across the world, the nation experienced a job loss of 20 million workers - an unprecedented 15 percent decline. Unemployment benefits became much more accessible and attractive, although it was never intended for Congress to pay people more for not working. However, many home care agencies lost many workers to attractive unemployment benefits while caregivers stayed home to care for their own.

COVID-19 forever changed the way we work. Before the pandemic, home care agencies competed with the retail and fast food industries for employees, with caregivers often working multiple jobs. As the demand for in-home care grew during the pandemic, and will continue to grow as our population rapidly ages, the need for caregivers – and caregiving as a real career option – is more important than ever. The National Institute on Aging reports that by 2030, the world is likely to have 1 billion older people, accounting for 13 percent of the total population.

Females, minorities, and lower-wage workers bore much more of the brunt of job losses during the pandemic than higherwage workers. That's a close definition of the lion's share of our direct care workforce. Unlike retail workers, the need for homebased care remained but the challenges faced by this demographic were similar.

### A Changing Landscape

A typical workday with my company involves answering questions about pay, benefits and schedules. However, starting in March, this quickly shifted to conversations about safety, PPE, and if companies were "good" employers and actually cared for their team. Today, we get guestions geared towards companies requiring the vaccine.

Over the next few months, we expect our conversations to remain the same. However, we'll likely start to see a shift of seniors that start to request a vaccinated caregiver.

In a poll we ran in February of 250 caregivers, alongside thousands of phone conversations, we estimate that 35 percent plan to be vaccinated, 20 percent do not and more than 40 percent remain unsure.

### What Matters Now? Culture.

Caregivers no longer just want a "gig." As mentioned previously, prior to the pandemic it was common for a direct care worker to work for multiple companies, often pulling together a schedule across many different industries. This stemmed from a craving for flexibility and the need to work more hours to make ends meet. Although flexibility is still important, it's a culture of care that matters now. Caregivers want to work for a company that they can get behind and for people that have their back and best interest in mind. This is a shift for most companies, but a good shift.

In a strange way, the pandemic will accelerate the industry to put programs and new thinking in place to improve culture that will in turn drive improved retention. That being said, culture shifts take time and require a movement and not a top down mandate. We have the privilege of working alongside thousands of healthcare organizations and for many, this shift will likely lead to a near term positive impact. For other organizations not as heavily invested in their people, it will take more time.

### Let's Solve It

The pandemic has taught my organization that we were too focused on spectating. It's now time to get in the game, assist caregivers and employers who are struggling, and stay focused on solving the culture of care. It will take all of us. But imagine if we can do it? Imagine if recruitment got easier, caregivers were wedded to their companies, retention was no longer a plaque, and seniors and disabled populations got better care. Let's strive for this together.



### **Latest Updates**

Recently, President Joe Biden proposed significant changes to home and community based services under Medicaid. An investment of \$400 billion would likely raise payments for home care services and thus wages for home care workers which may help address workforce challenges. The Administration is also proposing a \$100 billion investment in workforce as part of its American Jobs Act. **HCAOA** will be talking to members of Congress about these proposals. Some combination of these proposals is likely needed to address the workforce crisis that exists and is growing. HCAOA will be engaged in policy discussion with the White House and Congress in all areas to address the challenges ahead.

The home care workforce challenge is real. According to the U.S. Department of Labor's Bureau of Labor Statistics (BLS), the overall employment of "home health and personal care aides" is projected to grow 34 percent from 2019 to 2029, much faster than the average for all occupations. As the baby-boom generation ages and the elderly population grows, the demand for the services of home health and personal care aides will continue to increase.

While current overall unemployment remains high due to the impact of the coronavirus pandemic at 6.2 percent for February 2021, projections forecast a return to lower levels over time as the risks of the pandemic subsides.

As the United States population continues to age, it is clear that the existing workforce will not be able to meet their personal care needs. During times of lower unemployment rates, it can be complicated for home care providers to find qualified employees to care for seniors and individuals with disabilities.

By 2050, the population of adults over 65 is expected almost to double, growing from 47.8 million to 88 million. The number of adults over 85 is expected to more than triple over the same period, from 6.3 million to 19 million. While the population of older adults is growing, the number of working-age adults is projected to stagnate. Currently, there are 32 workingage adults for every adult over 85. By 2050, that number will plummet to 12.

HCAOA is working to ensure the Biden Administration and Congress are aware of these challenges. Solutions to this problem are not simple as demand for workers will continue to be high in all sectors of the economy.

# Home Care Workforce: No Easy Solutions

### **Demonstrations**

Rep. Matt Cartwright (D-PA) proposed legislation during the previous Congress to direct demonstrations through the U.S. Department of Health and Human Services for care coordination and service delivery redesign for older adults and people with disabilities who have a chronic illness or are at risk of institutional placement. These demonstrations would put direct care workers in advanced roles to improve efficiency and quality of care. It would also give direct care workers opportunities for career advancement through additional training, an expanded role, and increased compensation.

### **Workforce Training Grants**

In a letter dated March 17, 2021, Rep. Bobby Scott (D-VA), Rep Suzanne Bonamici (D-OR), and other legislators urge President Biden to include funding in his economic recovery package to help retrain workers who have lost their jobs permanently in the wake of the pandemic. They are urging that \$50 billion be dedicated to workforce training as a central part of the recovery plan. Their proposal is based on the Relaunching America's Workforce Act (H.R.602/S.200).

A recent report from the Department of Labor shows that about four million people are now classified as long-term unemployed after being out of work for more than six months. That total is likely an undercount. The Economic Policy Institute estimates that 15 percent of our nation's workforce is unemployed, otherwise out of work because of the pandemic, or employed but experiencing a change in hours and pay.

### **Immigration**

Some in Congress are advocating to address the challenge through immigration reforms that would allow more temporary workers into the United States. However, the politics around legal and illegal immigration complicate the ability of lawmakers to act.

Rep. Lloyd Smucker (R-PA) proposed legislation in the previous Congress to create a new visa category for non-agricultural, low-skill workers. The Workforce for an Expanding Economy Act would authorize a maximum of 85,000 new temporary visas.

The visa would be three years in length and twice renewable. Visa holders would be eligible to move between registered positions as long as they are not unemployed for longer than 45 consecutive days.

### Conclusion

Some combination of these proposals is likely needed to address the workforce crisis that exists and is growing. HCAOA will be engaged in policy discussion with the White House and Congress in all areas to address the challenges ahead.



# AGENTS OF CHANGE

THE RISE OF HOMECARE —

