

Part 2:

AGENCY GROWTH SECRETS

The Complete Guide to
Retaining Caregivers



CareAcademy™

ABOUT CAREACADEMY

For busy home care agency owners who want to grow their businesses, CareAcademy provides online caregiver training that empowers caregivers and improves the lives of older adults through engaging content and easy to use technology.



**#1 Provider of
Online Training**



Portable Records



**60 State-Approved
Topics**



Online Dashboard



Mobile Compatible



Customer Support

INTRODUCTION

At CareAcademy, we work with hundreds of home care agencies across the nation, from franchises to independent agencies, and from agencies with 2 caregivers to agencies with 500. There are several things all home care agencies have in common: struggling to recruit and retain caregivers.

In order to help agency owners learn from each other and foster growth in the industry, CareAcademy interviewed 4 top home care agencies that have seen tremendous growth over the last few years to find out what their agency growth secrets were.

Some of the questions we asked:



What channels did they use to recruit caregivers?



What was their onboarding process like?



What were some quick tips they could quickly implement that made a difference in reducing no-shows?



How did they upskill caregivers?

ABOUT THE INTERVIEWEES



Wayne Gentry

Owner, Home Helpers Home Care - London, KY

Wayne was able to grow his agency from 0 to 150 caregivers and to 2800-3000 billable hours/week in just 3 years! He was able to do all of this while accepting no Medicaid. In 2019, his agency was awarded the Home Care Leader of Excellence award, Employer of Choice award, and Provider of Choice award. In 2018, they were awarded the Veteran Advocate of the Year for 2018. Wayne is proud of his low retention rate in the first 30 days, which he attributes to his caregivers and client service managers.

ABOUT THE INTERVIEWEES



Peggy Milne

Owner, Home Helpers Home Care - San Mateo, CA

Peggy Milne and Mitch Williams opened their Home Helpers office in 2012 in San Mateo County, CA. Their agency has had tremendous growth and success over the years. They've received the "Leader in Excellence" award 4 years in a row and the "Employer of Choice" and "Provider of Choice" award 5 years in a row from Home Care Pulse, in addition to many Home Helpers and growth awards every year.

ABOUT THE INTERVIEWEES



Andrea Cohen

CEO & Co-Founder, HouseWorks

Andrea is a visionary leader who takes an entrepreneurial approach to service delivery. Under her leadership, her team built one of the largest, independent private home care companies in the country, employing ~500 caregivers in Boston and Philadelphia. She sits on the Board of The Commonwealth Institute, the Schwartz Center Leadership Council, and the Caregiver Action Network. She also serves as an appointee to the Massachusetts Women Forum and acts as an advisor to HomesRenewed and has advised several companies including Care.com, Confidant and Serality—all which provide innovative, online solutions for family caregivers.

ONBOARDING AND RETENTION PROCESS

Here are the stats on caregiver turnover:

57%

median caregiver turnover
rate in 30 days

82%

median caregiver turnover
rate in 90 days

In order to retain caregivers, you need to be intentional about your onboarding and retention processes. In this guide, we've outlined the processes and tactics you should use during:

1. **Orientation**
2. **First 90 days of employment**
3. **Beyond 90 days**

ORIENTATION

The first step of onboarding is typically orientation. If you've gotten your caregivers to come to orientation, make sure you are spending that in-person time wisely.

1. Complete all important paperwork as quickly as possible

2. Review agency-specific policies and procedures

3. Set expectations tied to specific goals

4. Meet with care coordinators /schedulers

5. Introduce caregivers to any technology you are using

6. Make sure caregivers leave knowing what next steps are

ORIENTATION

Most of this checklist is straightforward, and you may already be doing all of those things, but here's how you can make it better for your caregivers.

1. Complete all important paperwork

If the new hire hasn't completed their paperwork yet, make sure you have it all ready for them to complete when they come in. Don't wait for them to go home and do it on their own.

2. Review agency-specific policies and procedures:

You're probably already doing this, but how? Are they reading your policies off of an old powerpoint? We know that caregivers respond well to engaging video content that has a human touch to it. Include short videos of your staff talking, and make them feel part of a team.

3. Set expectations tied to specific goals:

Expectation setting from day 1 is so important. A caregiver needs to know the expectations of their role and what the reward will be if they reach those goals.

Set up a process at your agency so that caregivers know what they should strive for.

An example of goals you might set for a new hire:

- Show up for all shifts on time
- No last minute cancellations (48 hours)
- Care plan followed correctly or ask for help
- Memorize your client's family members names
- Cover 10 shifts for your co-workers

If the caregiver hits those goals, let them know what the reward(s) will be.

ORIENTATION

4. Meet with care coordinators/schedulers:

If they haven't already, new hires should meet with the care coordinator/scheduler that they will be working with. This allows the caregiver to see the scheduler/care coordinator as a human and not just someone behind a phone- they'll be less likely to no-show to shifts if they know that they will be disappointing someone they know. It's even better if you are able to match them to any available clients on the same day.

All the agency owners we interviewed said that this was a key component to engaging with caregivers during orientation!

5. Introduce caregivers to any technology you use:

If you are using a back office system like Clearcare or an online training platform like CareAcademy, introduce your caregivers to the technology during orientation. Make sure they have no questions about the functionality and what they are expected to do on each platform.

You may even want to take a sample class together, like *CARE0101: What Does It Mean To Be A Professional Caregiver?* or *CARE0202: Clients' Rights, HIPAA & Elder Abuse Prevention*. Afterwards, they can go home and complete the rest of their required training on their smartphones on their own time!

6. Make sure caregivers leave knowing what next steps are:

Before caregivers leave orientation, let them know what to expect. Will you be reaching out to them about their shifts? Who will be reaching out to them? Do they prefer to be called or emailed or texted?

FIRST 90 DAYS

According to the 2019 Home Care Pulse Benchmarking study, 82% of caregivers turnover within the first 90 days of being hired. It's extremely important that you are engaging with caregivers in this critical 90 day period.

- 1. Get the caregiver matched to a client within the first 3 weeks**
- 2. Check in with caregivers frequently**
- 3. Set up a caregiver mentorship program**
- 4. Tell caregivers how they are performing after 30 days, 60 days, and 90 days**
- 5. Make sure caregivers have (and understand) up-to-date care plans**
- 6. Provide soft skills and hard skills training**

FIRST 90 DAYS

Here's why we put those items on the list:

1.

Get the caregiver matched with a client within the first 3 weeks:

If you wait longer than 3 weeks, the caregiver is likely to drop off or have limited availability because they've already accepted a position working at another agency that matched them to a client.

Some specific tips on this:

- Get their mandatory training done quickly!
- Prioritize getting new hires shifts. Even if you can fill a shift with a veteran caregiver, give the shift to the new hire, if possible.
- If you know that you have a high concentration of clients who need specialized care, like dementia care, train your new hires in those areas so they have a larger pool of clients they can be potentially matched with. For example, assign them the following courses from CareAcademy's course library:

CARE1200: Introduction to Dementia Care

CARE1201: Communicating With a Person With Dementia

CARE1202: End of Life Dementia Care

CARE1203: Managing Agitation & Aggression in Dementia

CARE1204: Safety in Dementia

CARE1206: Parkinson's Disease Dementia

**DOWNLOAD
FULL CLASS LIST**

FIRST 90 DAYS

2. Check in with your caregivers frequently:

At a minimum, check in with a new caregiver before the first shift, after the first shift, and after the first week.

Wayne Gentry from Home Helpers Home Care said the key to retaining his caregivers in the first 90 days was his **“5 minutes in a box” method**. When Wayne was growing his agency, he personally called every single one of his caregivers every day for the first 90 days. As his agency grew, he hired client service managers, who now take the responsibility of calling all caregivers. Client service managers will then report to him weekly on the caregivers that are at risk. The team would then pay special attention to at-risk caregivers and make sure they found out what was going wrong and what they could do to retain them. Despite having 150+ caregivers, Wayne still continues the 5 minutes in a box engagement method at his agency!

3. Set up a caregiver mentorship program:

Another way to provide support to new caregivers is by pairing them with a caregiver mentor, who can be a veteran caregiver. Your new caregiver will appreciate the support from someone who understands their position. This also gives you the opportunity to recognize your veteran caregivers if you promote them to a “caregiver supervisor” position.

4. Tell caregivers how they are performing after 30 days, 60 days, and 90 days:

If you set up expectations during orientation, you should also be letting caregivers know how they are performing to expectations.

FIRST 90 DAYS

In the orientation section of this guide, we suggested setting the following goals for the first 90 days:

- Show up for all shifts on time
- No last minute cancellations (48 hours)
- Care plan followed correctly or ask for help
- Memorize your client's family members names
- Cover 10 shifts for your co-workers

At 30 days / 60 days / 90 days, how are they performing in relation to those goals? If they aren't hitting them, is there anything you can do to support them in hitting those goals? If they are, they should be rewarded, and a new set of more ambitious goals can be set.

5.

Make sure caregivers have (and understand) up-to-date care plans:

Caregivers are often the ones who have the “highest touch” with their clients, but they aren't always included in discussions about their clients' care plans.

Make sure you are giving your caregivers (to the best of your ability), as much information as you can on their clients and their care plans. They should fully understand the care plan and have an opportunity to ask questions. If they are unfamiliar with the client's disease, that's a good place to start their training. Doing so prepares caregivers for situations they may encounter and puts them in a better position to respond appropriately.

FIRST 90 DAYS

6.

Provide both soft-skills and hard-skills training:

Agency administrators often overlook the importance of soft-skills training. Caregivers are working with clients all day, and their clients may not be the best communicators themselves. Many caregivers are unprepared for the stresses of caregiving and don't know how to cope with clients who are at the end of their life. At CareAcademy, we believe in the importance of training your caregivers on BOTH soft skills and hard skills.

Sample soft skills training classes

CARE0113: Professionalism: Communication, Problem Solving & Cultural Competency

CARE0103: Communicating with Older Adults

CARE0104: Time Management & Organization Skills

CARE0107: Working with an Aging Population

CARE0900: Coping Skills for Caregivers

CARE0901: Improving Caregiver Empathy

CARE0902: Managing Job-Related Stress

Here's a sample of how you can set up a training schedule for new hires, which includes some agency-curated training and some CareAcademy training.

Pre-Orientation	30 Day	90 Day
CARE0101: What does it mean to be a professional caregiver?	CARE00113: Professionalism, Communication, Problem Solving, & Cultural Competency	Assigned depending on clients.
CARE0202: Client's Rights, HIPPA, & Elder Abuse	CARE0403: Overview of Mobility & Safety Equipment	Examples:
Orientation	CARE0802: Safety & Falls Prevention: Part 1	CARE1200: Introduction to Dementia Care
Agency curated training: Policies and procedures, dress code, agency-specific information	60 Day	CARE1201: Communicating With a Person With Dementia
	CARE0803: Safety & Falls Prevention: Part 2	CARE0501: Overview of Heart Disease Care
	CARE0700: Maintaining a Clean & Healthy Environment (Infection Control)	CARE0512: Advanced Heart Disease Care

BEYOND 90 DAYS

While the first 90 days are when a caregiver is most vulnerable, you also want to make sure you are recognizing and appreciating your more veteran caregivers.

1. Provide ongoing education

2. Upskill your caregivers

3. Annual review of achievements

BEYOND 90 DAYS

1. Provide ongoing education:

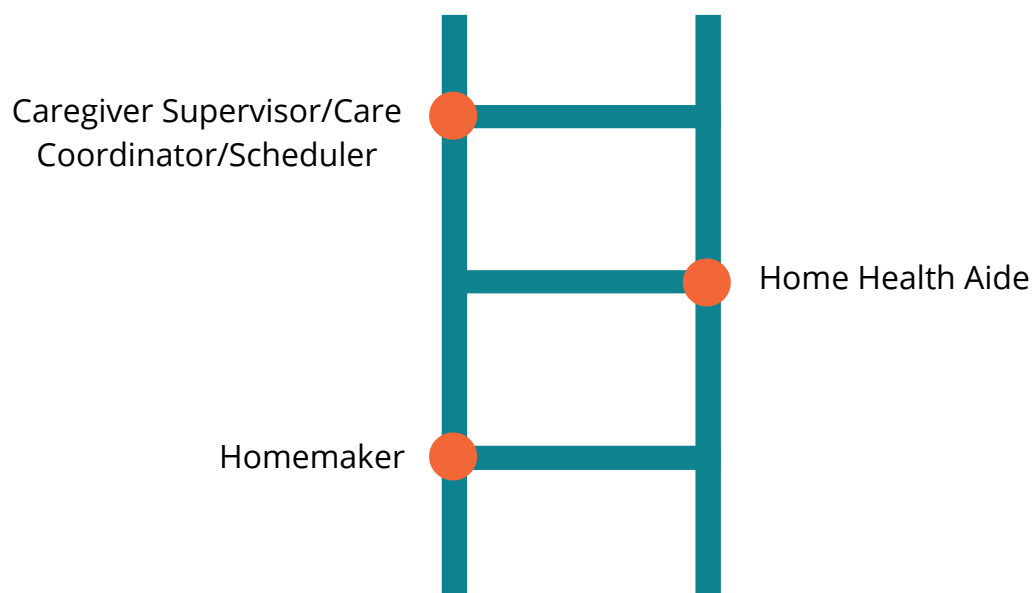
In addition to initial training, you should be providing your caregivers with annual and ongoing education, regardless of whether or not your state requires it. Find out what types of clients your caregivers like working with, and if they have any skills gaps you can help them fill in.

At CareAcademy, we recommend putting your caregivers through “fast tracks” pathways, which are bundles of classes focused on a specific topic.



2. Upskill your caregivers:

You can upskill your caregivers by **building a career ladder** for them. Here's an example of a simple upskilling pathway:



BEYOND 90 DAYS

Here's what's so great about this career ladder:

- All caregivers will have opportunities to grow, move up in the organization, and get pay raises.
- The agency owners we interviewed noted that caregivers also made the best care coordinators/schedulers, because they understand what it's like to be a caregiver, and caregivers respect that.
- Many care coordinators double as caregivers, so they spend a portion of their time as a care coordinator and a portion providing care.
- If you have caregivers who are homemakers but are having trouble recruiting and hiring HHAs, you can always upskill your current caregivers and reduce the need to recruit more HHAs.

3. Annual review of achievements:

According to the 2019 Home Care Pulse Benchmarking study, the #1 way caregivers prefer to be recognized is verbal recognition from their supervisor.

While you should be giving verbal recognition to caregivers more than once a year, an annual review is a great way to review a caregiver's achievements and make sure they are recognized for them.

You should also be tying those achievements to raises (the #3 way caregivers prefer to be recognized). By doing so, you'll motivate your caregivers to continue at high levels of achievement, because they know they'll be rewarded for doing so.

HOW DO YOU MAKE THE TIME?

Recruiting, onboarding, and retaining caregivers while ensuring client satisfaction and growing your business is no easy task. In order to do so successfully, you need to be intentional about where you spend your time and where your office spends their time. When we just isolate the process of getting your caregivers trained before they can start their first shift, **think about where that office staff time is going:**

- Developing a training curriculum
- Back and forth communication to coordinate a time for caregivers to come into the office
- Holding in-person training sessions
- Calling caregivers to ask them to complete their training
- Collecting training logs for audits
- Re-training new hires who may have already completed initial training at another agency

If you aren't sure how much time your office staff is spending doing all of those things, ask them! When we asked agency owners how long their office staff spent on those tasks before CareAcademy, many of them were spending 20+ hours per month on calling caregivers to ask them to complete their training alone!

Now think about where you could be spending that time:

- Calling caregivers for 5 minutes a day to check-in on them
- Identifying and paying special attention to at-risk caregivers to reduce turnover
- Recruiting more caregivers so you can service more clients and increase your revenue
- Quality assurance/client satisfaction
- Marketing activities to acquire more clients

Here's how CareAcademy is saving our customers 50+ hours/month:

- 60 state-approved classes caregivers can complete on their smartphones, on their own time
- Engaging, video-based classes that have a 90%+ class completion rate
- Automated reminders that email and text your caregivers to complete their training
- At-a-glance dashboard so you can see your caregivers' training progress at any time.
- Audit-ready compliance reports that can be downloaded or printed with just a few clicks
- Portability feature that allows caregivers to show you certificates of completion for their past training, so you don't need to re-train new hires
- Updated, easy-to-use technology
- Customer support team that is available 7 days a week on chat, phone, and email for both you and your caregivers

Interested in Seeing How CareAcademy Works?

[SCHEDULE CALL](#)

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