



**CARING**  
Home Care



# Participant Guide

HR Operations

# LEADING BRANCH OPERATIONS

## HR Operations

 Please give your full attention to the class.

 Please treat others with kindness and respect.

### Overview

This class is all about you. Our goal is to help you be a successful Executive Director in your home care agency. We want you to walk away with practical skills you can apply to improve your business.

### Session Goals

By the end of the session, you will be able to:

- Identify techniques to develop associates so they can perform in their roles.
- Foster effective communication within the branch.
- Mitigate employee relations issues by identifying the steps to take when facing various complex situations.
- Implement a People Strategy Roadmap to prevent turnover and identify various HR areas to work on in your business.



#### IMPORTANT NOTE:

This is an interactive course, not a lecture. We want you to make connections with others in the class. If you can find a space where you can be uninterrupted would be best.



#### IMPORTANT NOTE:

Please try to directly connect via Teams not using a phone to dial in. The interactivity features we want to use for this course rely on a computer connection into teams.



### Best and Worst Bosses

**Recommended Time: 10 mins.**

**To Do:** What qualities did your “best” and “worst” bosses have?

In a breakout session in small groups, reflect on the following questions and be prepared to share your thoughts with the larger group.

1. Identify the best qualities

2. Identify the worst qualities

3. Why do you think they had those qualities?



## Examples of GROW Coaching Questions

### Goal

- What would you like to talk about?
- How important is this goal to you on a scale of 1-10?
- How attainable is your goal?
- What specifically do you want to achieve?
- When do you want to achieve it by?
- How would you measure your goal if you achieved it?
- What are milestones on the way to your goal?
- What outcome do you want?

### Reality

- Who is involved?
- What have you done or tried to do about this?
- What is holding you back from finding a way forward?
- How do you know this is accurate/true?
- What do you think about what you have just said?
- What type of relationships exist?
- Is the problem in your control?
- What is holding you back from accomplishing your goal?

### Options

- What could you do to change the situation?
- What other approaches have you seen work?
- Who might be able to help you?
- What else could you do?
- What are the benefits and risks of your options?
- What choices can you make?
- What is another way to look at that?
- Have you discussed it with \_\_\_\_\_?

### Willing

- What will happen if this goal doesn't happen?
- What is your next step?
- What is stopping you?
- How will you prioritize your options?
- Which option or options would you choose?
- What will you gain if you take actions?
- How committed are you on a scale of 1-10?
- What would it take to get to 10?



### The Friday Email

**Recommended Time: 15 mins.**

**To Do:** You Get this email from your boss on Friday afternoon.

Subject: Meeting

Can you schedule a meeting with me on Monday? We need to talk?

-Boss

In a breakout session in small groups, reflect on the following questions and be prepared to share your thoughts with the larger group.

1. What do you do?

2. What would you be thinking over the weekend?

3. How would you feel?



## How to Communicate An Expectation

### 1. What is the **TASK**?

What is the task or project I Am taking ownership of?

I need you to clean the table.

### 2. What is the **OUTCOME/DELIVERABLE**?

**Consider:**

- Level of detail
- Format
- Measures or standards
- End-user of information

In the next two hours the table needs to be clean according to AAMI standards. All our safety procedure steps need to be completed correctly.

### 3. What **ACTIONS** will I take to **complete the task, project, outcome or deliverable**?

**Consider:**

- Others involved
- Authority needed
- Assistance needed
- Resources needed

Get Sam from materials to help validate the clean and get the cleaning materials from facilities.

### 4. What are the **BY WHENs**?

What are the deadlines for this task, project, or deliverable?

*Consider: What is the agreement to renegotiate if the deadline cannot be met?*

We need this done in 3 hours to accommodate the next patient. If you can't make that happen I need to know in 1 hour to find another table.

### 5. What are the **STAKES / BENEFITS** associated with this **task, project, or deliverable**?

- Benefits of completing?
- Consequences of not completing?
- Who will be impacted?

We will not be able to handle all the patients we have if we don't have this table in time and quality of care will be impacted.



## Case Study #1: Attitude & Behavior Concerns

**Recommended Time: 15 mins.**

**To Do:** Read the Case Study and discuss it in groups.

In a breakout session in small groups reflect on the following questions and be prepared to share your thoughts with the larger group.

### The Associates:

- Jane Jones – Clinical Manager, hired 7 months ago
- Mickey Green – RN Case Manager, hired 7 years ago
- Sam Samson - LPN, hired 5 years ago

### **The Case:**

Jane has been in her role for the last 7 months. Occasionally, the branch staff has reported to the Branch Director that her communication style has been unprofessional. There were multiple clinicians stating that Jane would talk down to them in a demeaning and condescending tone. Two months ago, the Branch Director had verbal conversations (undocumented) with Jane about softening her approach. Unfortunately, there has been no improvement.

Not too long after the Branch Director received resignations from two very tenured clinicians. RN, Mickey Green, and LPN, Sam Samson, submitted their resignation stating they are tired of being treated without respect and do not like being yelled at by the Clinical Manager, Jane. Due to Jane’s unprofessional communication style and behavior, the branch was not able to retain Mickey and Sam.

1. What questions would you ask?

2. How do you address the associates in this situation?



## Case Study #2 Attendance Concerns

**Recommended Time: 15 mins.**

**To Do:** Read the Case Study and discuss it in groups.

In a breakout session in small groups, reflect on the following questions and be prepared to share your thoughts with the larger group.

### The Associates:

- Patricia Peters - PSC, hired 3 years ago
- Jane Jones - Clinical Manager, hired 8 month ago
- Samantha Smith - Executive Director, hired 5 years ago

### **The Case:**

During her time with the company Patricia's performance has exceeded expectations and she has had excellent attendance. Samantha and Jane have noticed a decrease Patricia's punctuality and overall attendance. They conclude that over the last 4 weeks Patricia has called in to work 4 times and has had 7 significantly late arrivals to work.

Samantha and Jane schedule a meeting with Patricia to discuss their concerns with her tardiness and attendance patterns.

While speaking with Patricia about their concerns, she shared that her child has recently been diagnosed with a serious medical condition that can cause unexpected flare ups and causes the child to wake in the night. More recently, the condition has worsened, and the child has had to stay home from school causing Patricia to call in to work unexpectedly.

1. What next steps would you take?

2. How do you address Patricia in this situation?





### Case Study #3 Late Documentation and Patient Complaints.

**Recommended Time: 15 mins.**

**To Do:** Read the Case Study and discuss it in groups.

In a breakout session in small groups reflect on the following questions and be prepared to share your thoughts with the larger group.

#### **The Associates:**

- Betsy Rose – RN, hired 3 years ago
- Renae Kennedy - Clinical Manager, hired 3 years ago

#### **The Case:**

The Clinical Manager received a complaint from a patient regarding Betsy not arriving to visits as scheduled and they don't always know if/when she is coming. The patient complained about Betsy's attitude and communication. The patient said communication was short, and that Betsy didn't seem competent in performing her job duties. The last visit Betsy was 2 hours late and didn't call, the patient does not want Betsy to return.

Based on an HCHB Report, in a four-week time period, Betsy had 14 visits with late documentation that were not synced by 9 am.

1. What questions would you ask? What information is missing?

2. How would you address Betsy as Executive Director?



## Case Study #4 Fraudulent Documentation Concerns

**Recommended Time: 15 mins.**

**To Do:** Read the Case Study and discuss it in groups.

In a breakout session in small groups reflect on the following questions and be prepared to share your thoughts with the larger group.

### **The Associates:**

- Shirley Smith, 52 years old, patient
- Jenny Jones, LPN, Full Time; hired 6 months ago
- Tracy Thompson, RN Case Manager Full Time; hired 4 years ago

### **The Case:**

Shirley has been on service for seven weeks.

During Shirley’s visit she shared with Tracy she was “not feeling well.” She told her that she had severe headaches, nosebleeds, fatigue, vision problems, and occasionally an irregular heartbeat. Tracy is aware that these could be symptoms related to high blood pressure concerns.

When Tracy reviewed Shirley’s chart in HCHB she noticed that the vital signs recorded by Jenny’s last 2 visits were identical. This included temperature, pulse, respirations, blood pressure, oxygen saturation level and pain levels. Surprised by this, Tracy asked Shirley about her visits with Jenny. Shirley said that Jenny is very nice, and she enjoyed talking with her very much when she last saw her about 3 weeks ago.

1. What next steps would you take?

2. How would you address this situation with Jenny?



### Your Branch Success Plan

**Recommended Time: 10 mins.**

**To Do:** Open your Branch Success Plan template and start by filling in your current and future state. Start to identify some short-term and long-term goals you want to accomplish.



## Hawkins Indiana - Branch Success Plan

Branch Director: Sally Wolfowitz

### Short Term Goals- Achieve in Next Two Months

- Fix customer relationship with Sunset Senior Village and their Director.
- Improve quick-quit rate at the branch.
- Learn how to pull my HCHB reports
- Improve IDG meetings with clear agenda and follow IDG process.
- Replace with relevant examples for you.

### Long Term Goals – Achieve in the Next Year or Two

- Improve our contribution margin% from 15% to 30%
- Reduce turnover in Nursing from 45% to 20% through targeted communication and training.
- Build a relationship with Memorial Hospital
- Increase capability to take patients in the North region
- Complete HR People Strategy Roadmap
- Replace with relevant examples for you.

### Actions to Take Towards Goals

Action	Owner	Due Date
Call every nurse in their first 90 days at least once a week and check in.	Sally/Office Team	Weekly
Call memorial hospital director to check in with	Sally	Next Week
Set time to call all new admits to improve CHAPS scores.	Sally	Weekly

### Current State:

- We are disorganized and need consistent direction
- Our quality scores start rating is 3.5 and we don't have a QAPI culture.
- People don't know their roles and accountabilities.
- We are not marketing ourselves as effectively and using the data we have to drive decisions.
- Our contribution margin 10% is below budget.

### Future State:

- We are organized and have clear direction
- Our quality scores are 5.0
- We have a QAPI culture and drive continuous improvement
- We effectively partner with BD to market our value.
- Our contribution margin is %10 above budget.

### Issues Found and Gaps

- QAPI plan has been executed poorly in the last year
- We have no HR people strategy in place and turnover is at 45% with RNs
- High quick quit rate 60%.
- IDG meetings are not effective.
- Relationship with BD has been strained.
- Contribution Margin is below budget and our PPD spend is abnormally high.

### Branch Results

Key Metrics	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Star Rating	3.5							
CHAPS Score	Below Average							
Contribution Margin	15%							
ADC	62							
Turnover Annual% RN	45%							