

2021



The 12th Annual Edition of the

Home CareTM

BENCHMARKING STUDY

Conducted By:



Endorsed By:



SALES & MARKETING
RECRUITMENT & RETENTION
FINANCE
OPERATIONS

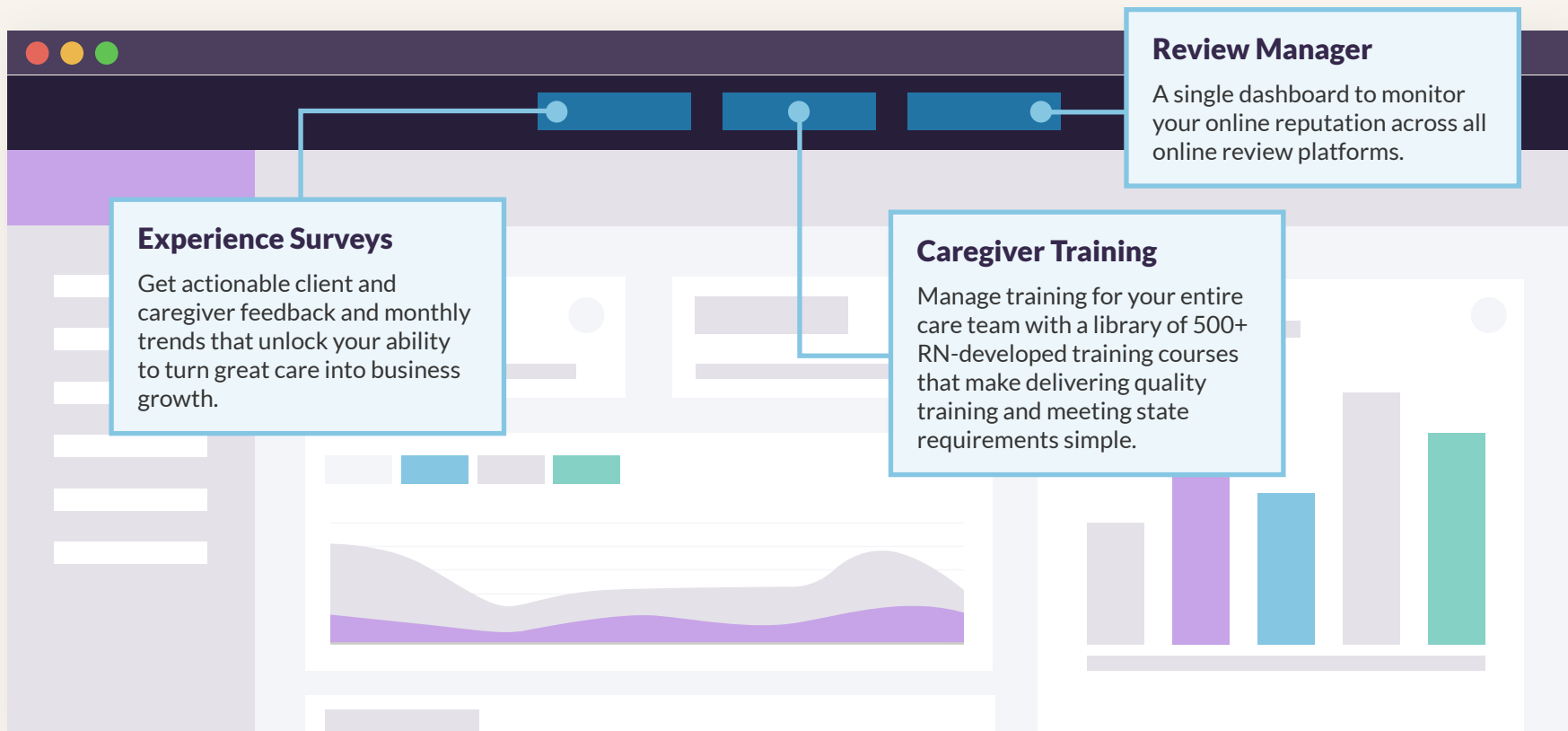
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Acknowledgments

Thank you to all of our 2021 study sponsors, specifically *The Home Care Association of America (HCAOA)*, for your incredible support and valuable contributions to this study.

Thank you to all of our 2021 participating organizations for promoting national participation and furthering the purposes of this Study.

We also appreciate the support of many other industry leaders and, of course, all those who dedicated their time to participate in the Study. Your support made this Study a success!

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2021 Home Care Benchmarking Study

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Executive Summary

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- 3** *The Power of Data*
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Sales & Marketing

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Client/Caregiver Experience

Best of Home Care



SUMMARY

EXECUTIVE SUMMARY

A brief introduction to the 2021 Home Care Benchmarking Study with articles from Erik Madsen, CEO of Home Care Pulse, and Vicki Hoak, Executive Director of the Home Care Association of America. Also included in this section is an overview of the participants in the survey including years in business, provider type, geographic location, and annual revenue.



Erik Madsen

Chief Executive Officer | Home Care Pulse

ARTICLE

The Power of Data

With the events of 2020, we're thrilled to bring you what might be the most important Home Care Benchmarking Study yet. In the 12th annual edition of the Study, home care agencies across the country and in your local area have shared their numbers, best practices, and strategies with us to provide a more in-depth look on how to navigate a challenging home care landscape. I want to extend a big thank you to all who participated.

It's been over a year since we first faced the pandemic, and while there have certainly been challenges, it's evident that home care is a resilient industry. This study may be the most important study we've ever conducted, as we've pinpointed data on the impact that COVID-19 has had on home care and what it can teach us about the future.

Home care is at a pivotal point. We've made some major breakthroughs recently and have many opportunities on the horizon; however, the question is: How are you going to use the data to make transformative decisions and changes in your business?

Our goal with the Home Care Benchmarking Study is to provide you with the data and resources necessary to have insurmountable growth. Once you can identify where you're succeeding and where you need improvement, you'll be able to create differentiators and set yourself apart from the competition.

Change and growth isn't always comfortable, but with the right data, you'll be able to clearly see what is and isn't working for other agencies, evaluate your own, and grow your agency to new and improved heights.

Thanks for your continued dedication to making home care a better space for all. 🏠

Best Regards,

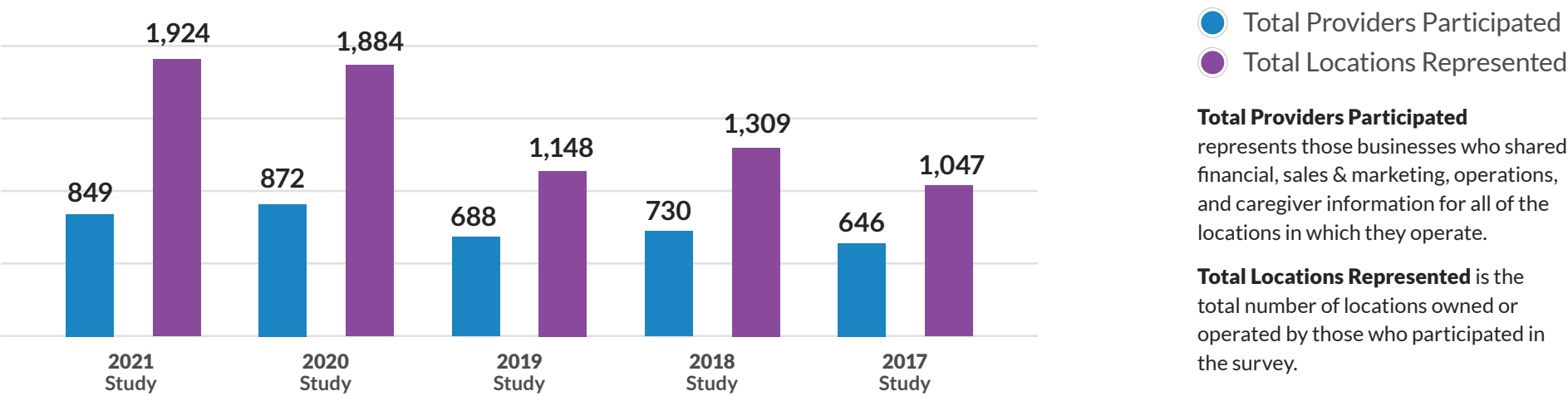
Erik Madsen
CEO, Home Care Pulse

Before joining Home Care Pulse, Erik spent eighteen years working with a global consumer products company covering sales, marketing, customer support, and operations. Erik has a master's degree in business management from Idaho State University, and he loves using his knowledge and experience to help others succeed and organize chaos into functioning systems and processes.



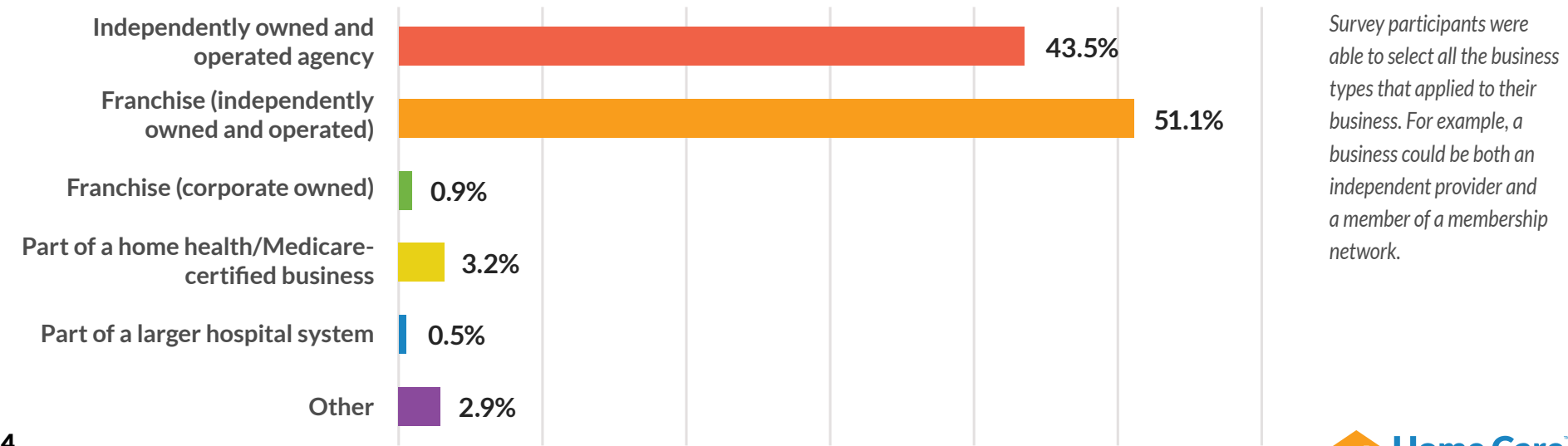
OVERALL SURVEY PARTICIPATION

1.1 Historical Total Participation



OVERALL SURVEY PARTICIPATION

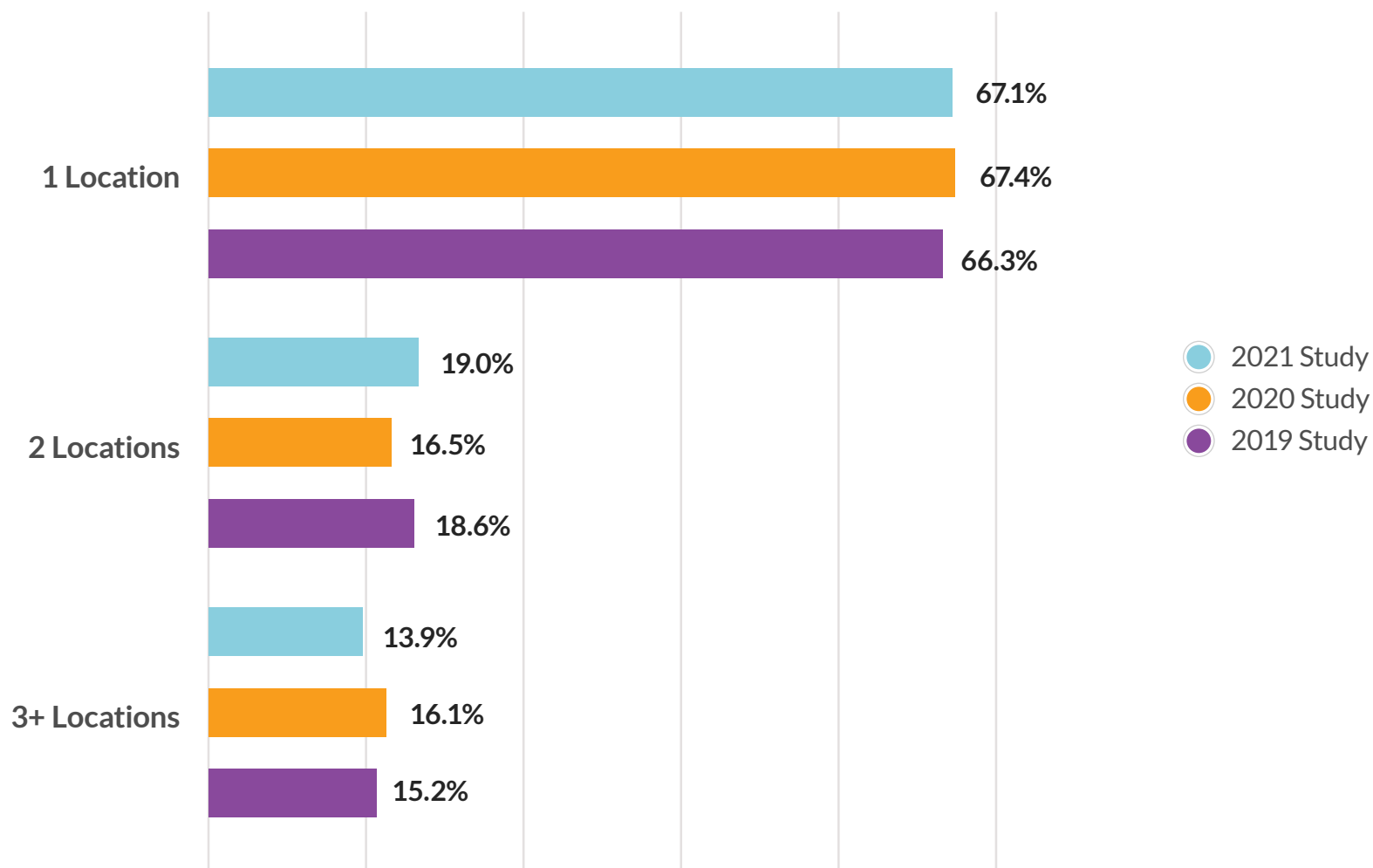
1.2 Participation by Provider Type for 2021 Study





OVERALL SURVEY PARTICIPATION

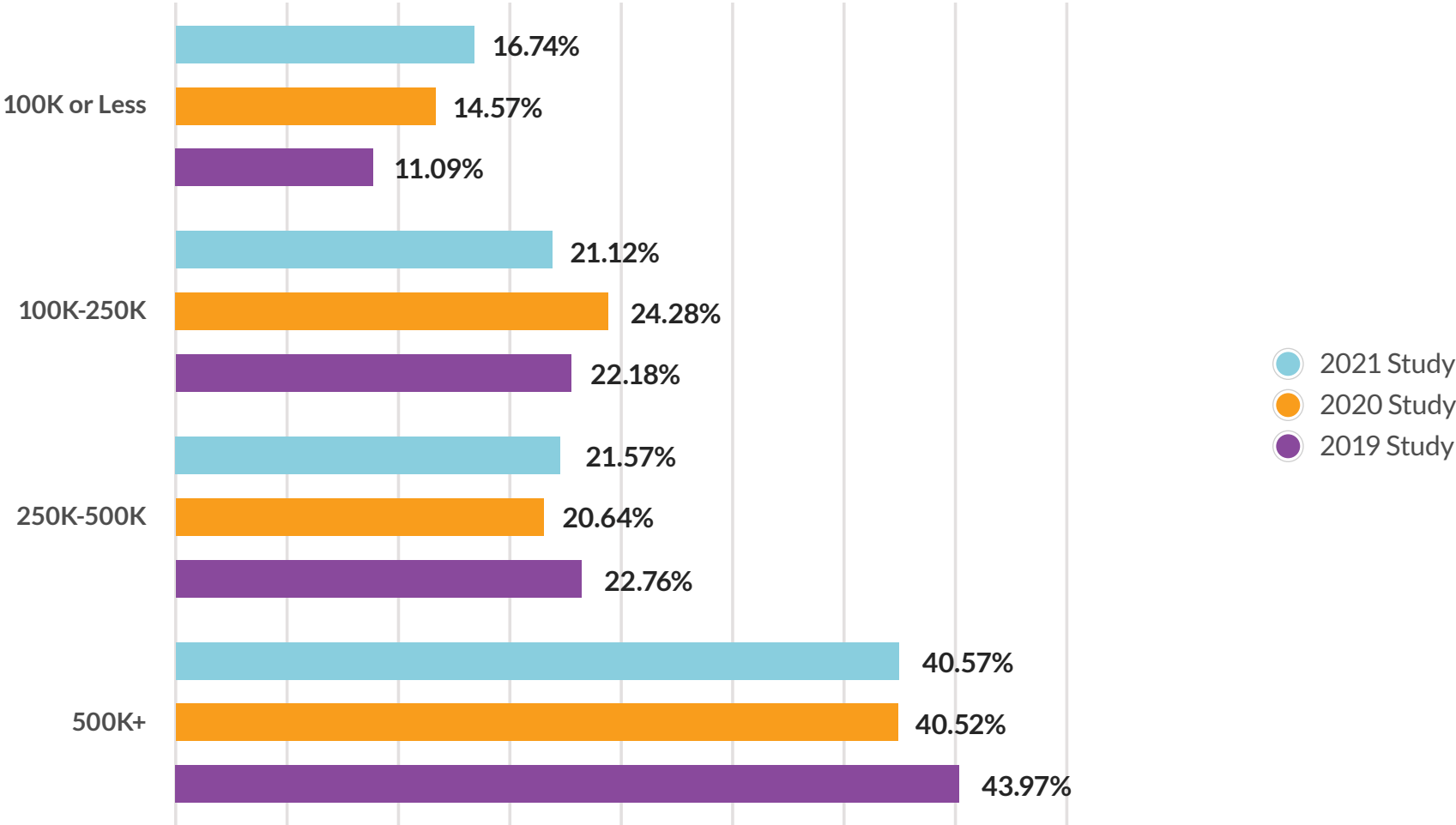
1.3 Historical Participation by Number of Locations





OVERALL SURVEY PARTICIPATION

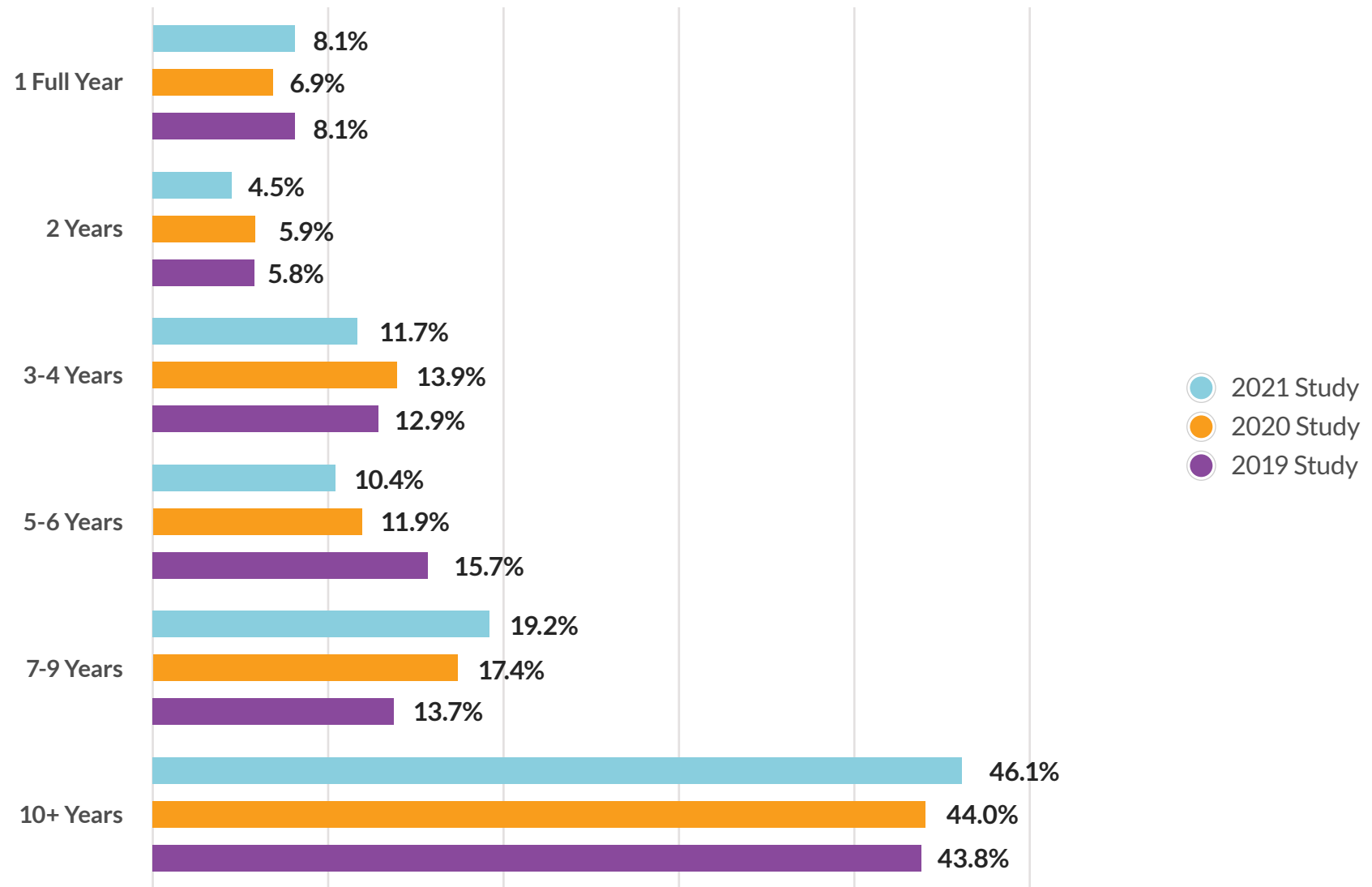
1.4 Historical Participation by Populations Served





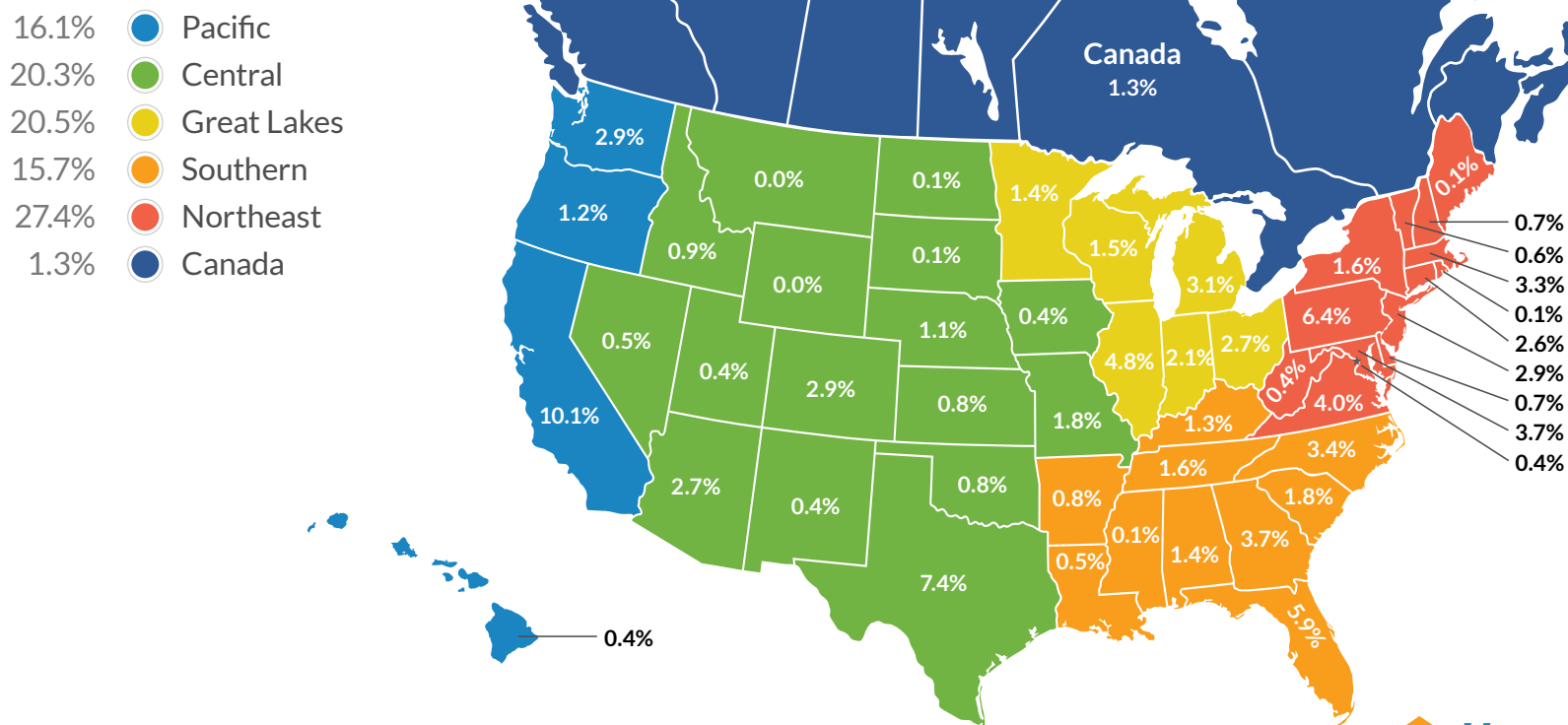
OVERALL SURVEY PARTICIPATION

1.5 Historical Participation by Years in Business



OVERALL SURVEY PARTICIPATION

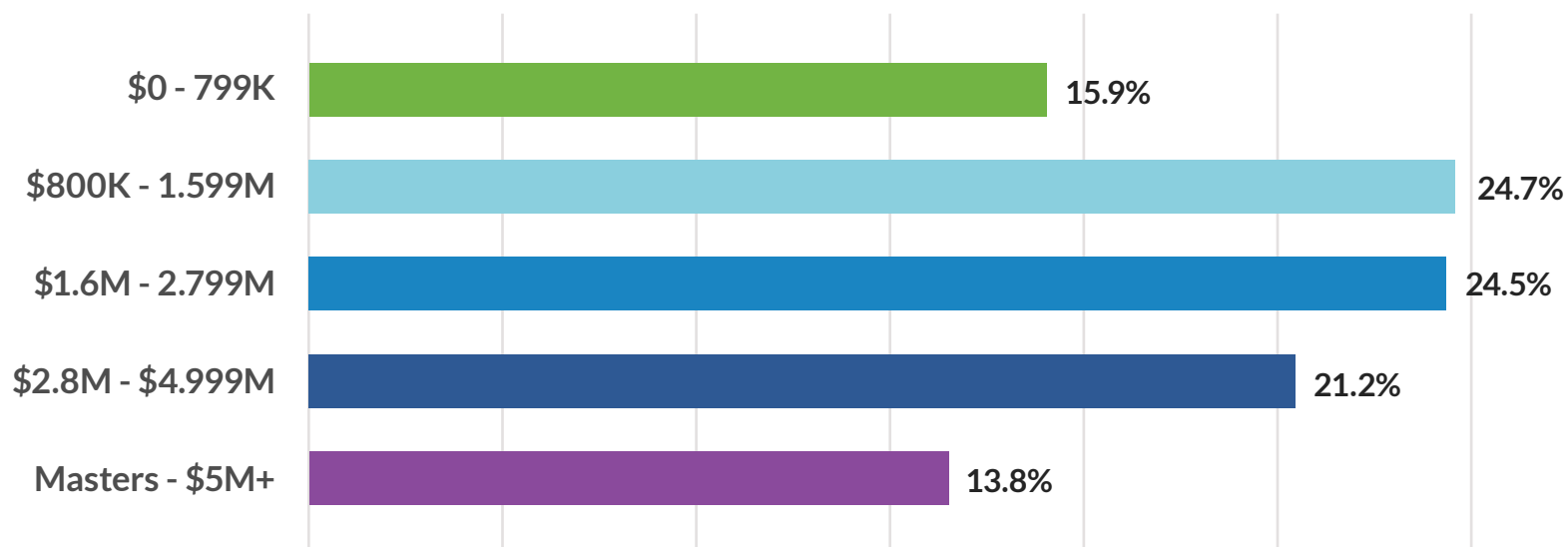
1.6 Participation by U.S. State & Canada for 2021 Study





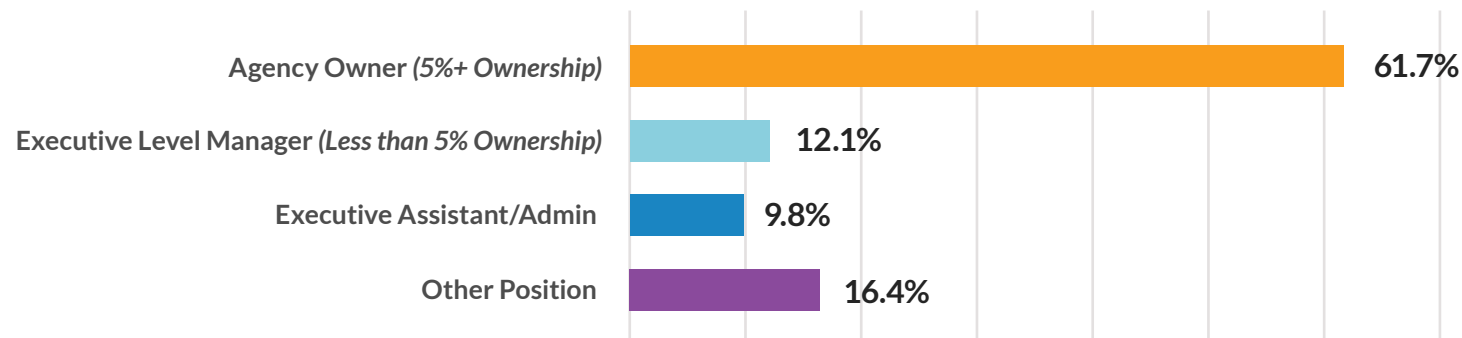
OVERALL SURVEY PARTICIPATION

1.7 Participation by Revenue Range for 2021 Study



OVERALL SURVEY PARTICIPATION

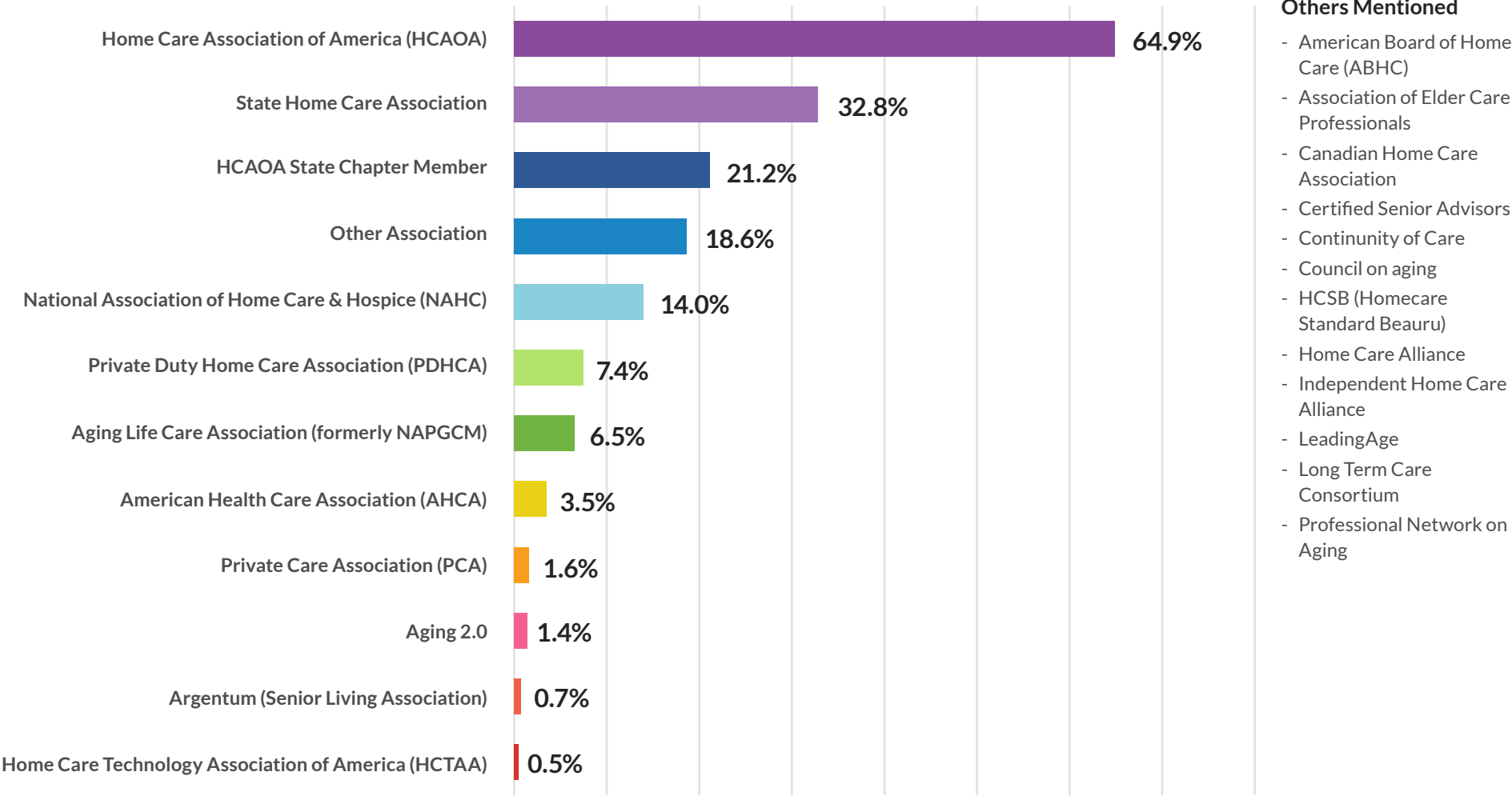
1.8 Participation by Participant Position Title for 2021 Study





OVERALL SURVEY PARTICIPATION

1.9 Membership Associations for 2021 Study



This graph represents those providers who are part of a membership association. From a list of associations, survey participants were asked to “select all that apply.”



Masters Participation Comparison

MASTERS DEFINITION

The Masters were determined based upon the most accurately tracked criterion: annual revenue. All participating home care companies that billed more than **\$5 million in 2020** qualified and are represented here. Before 2019, the determining revenue for leaders was \$2.8 million. As the industry grows, the Masters criteria adjusts to keep top home care agencies in the top 25% of the industry.



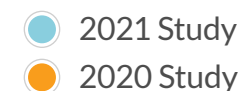
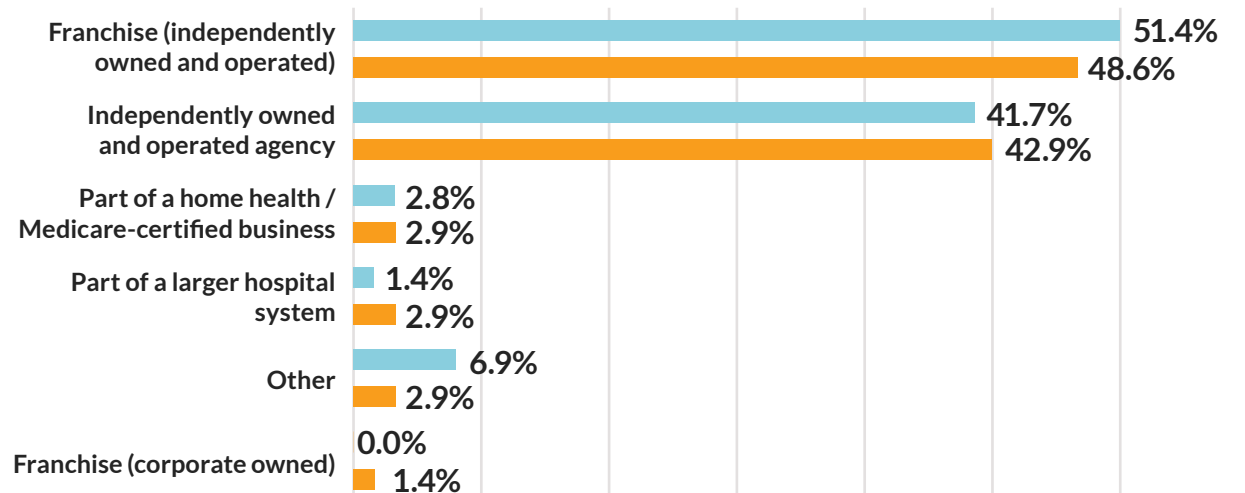
Become a Home Care Master

Grow your business with the Home Care Pulse Experience Management and become a home care master. Home Care Pulse users are 10%+ more likely to be Masters. Learn more about the **“Impact of Experience Management & Online Caregiver Training” on page 161.**



MASTERS PARTICIPATION SUMMARY

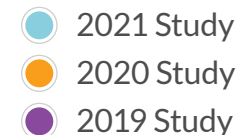
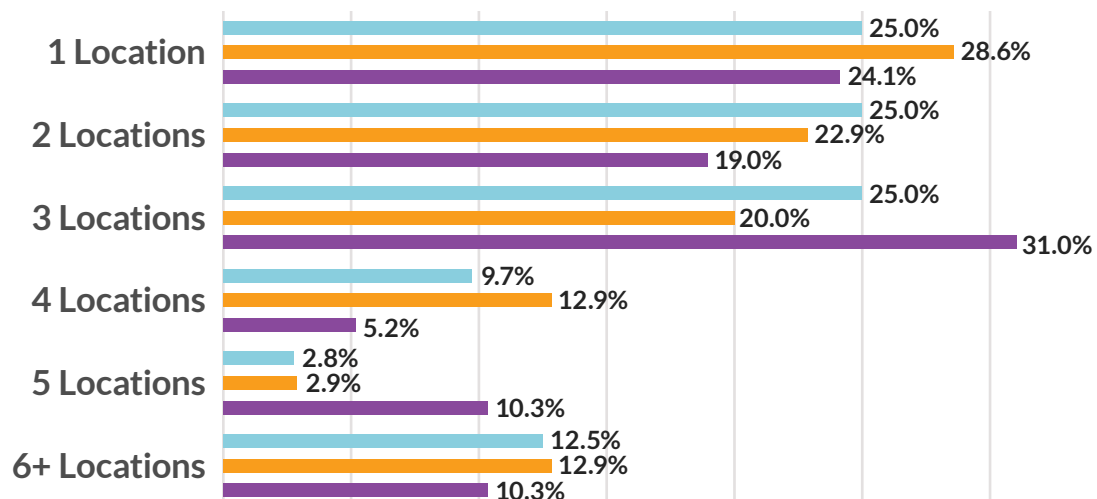
1.10 Masters Participation by Provider Type for 2021 Study



Only participating home care companies that billed more than \$5M in 2020 qualified and are represented here.

MASTERS PARTICIPATION SUMMARY

1.11 Historical Masters Participation by Number of Locations

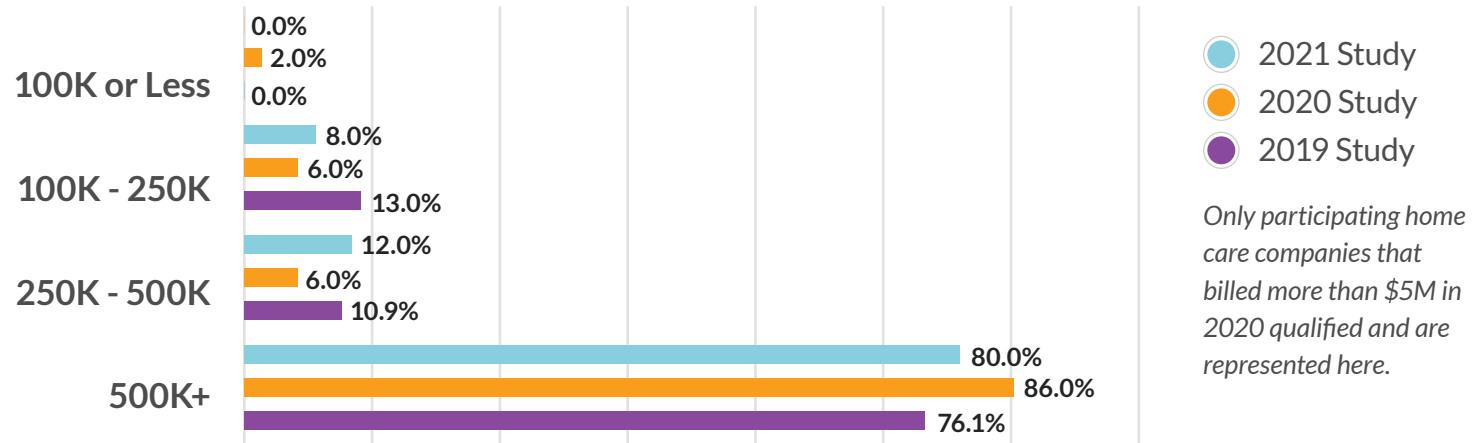


Only participating home care companies that billed more than \$5M in 2020 qualified and are represented here.



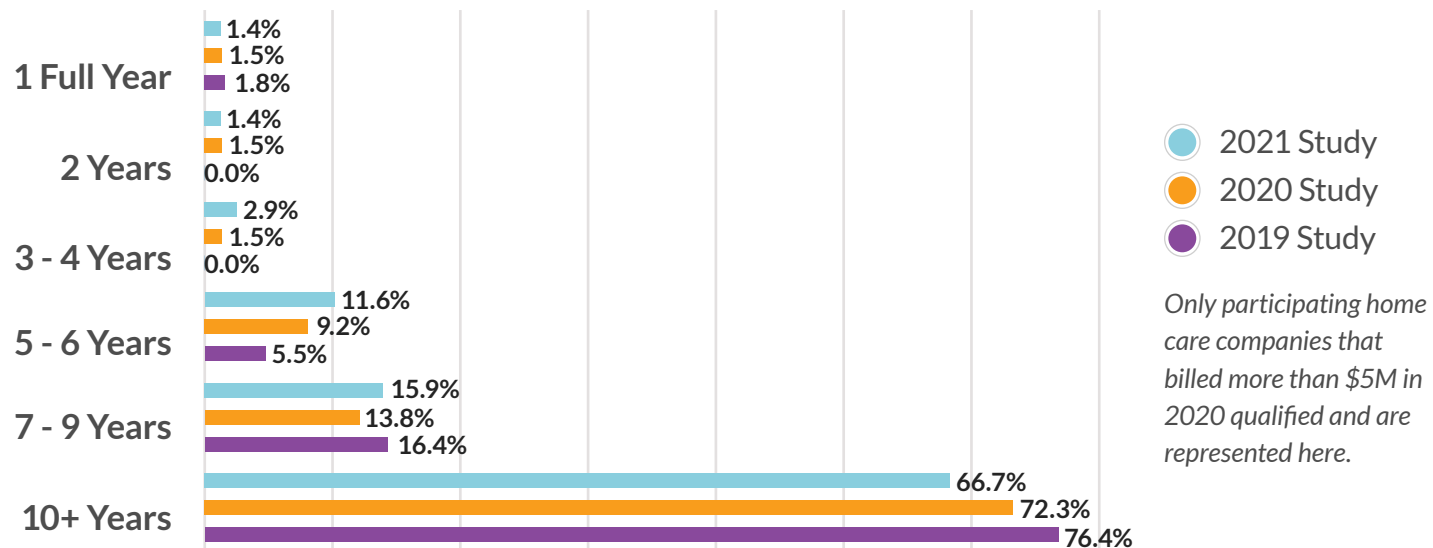
MASTERS PARTICIPATION SUMMARY

1.12 Historical Masters Participation by Population Served



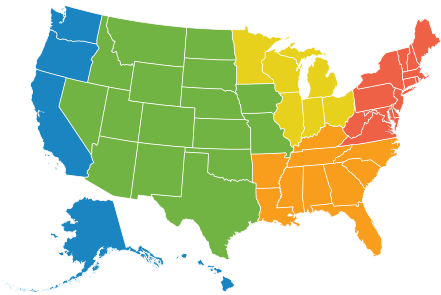
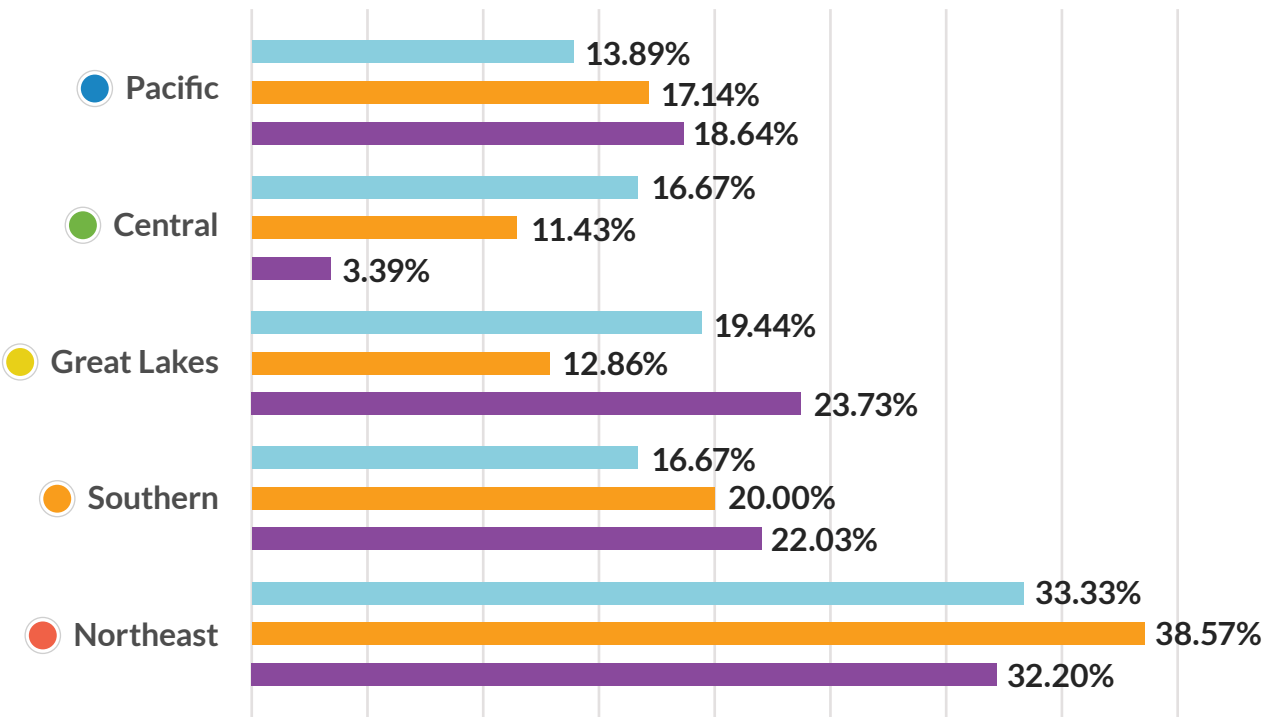
MASTERS PARTICIPATION SUMMARY

1.13 Historical Masters Participation by Years in Business



MASTERS PARTICIPATION SUMMARY

1.14 Historical Masters Participation by Geographic Region



- 2021 Study
- 2020 Study
- 2019 Study

Only participating home care companies that billed more than \$5M in 2020 qualified and are represented here.



Vicki Hoak

Executive Director | Home Care Association of America

ARTICLE

Data & Documentation: Why it Matters in Health Care

One year ago, we watched the world quickly shut down as the World Health Organization declared the coronavirus outbreak a pandemic. Maybe this is when your agency decided to work remotely for a few weeks—which soon turned to months. Major sporting events were cancelled, and schools were shut down. We cannot forget that the most devastating part of the last year is that we lost more than 500,000 American lives. One in three Americans knows someone who has passed away from COVID-19.

As families were urged to stay at home to stop the spread of COVID-19, home care agencies and their staff became critically important to prevent the spread of COVID-19 and protect those most at-risk from the disease. The coronavirus flipped modern day thinking about long-term care on its head. Home care was the prescription for COVID. Caregivers allowed for vulnerable populations to stay home with someone monitoring their condition, which kept them safer and undoubtedly saved countless lives.

The Importance of Data to Home Care

Home Care Pulse has been the leading provider of data and insights on our industry for many years. HCAOA values our partnership and looks forward to expanding our partnership with Home Care Pulse to establish uniform benchmarks that will quantify and demonstrate the impact home care has on reducing hospitalizations, admissions to

nursing facilities, reduction of falls, and managing chronic illnesses.

Last year, we were especially reminded that standardized data collection is essential to validating the value of home care. Data is crucial to our operations and opens the door to improvement. Consumer satisfaction surveys push agencies to provide better care and determine where they stand in relation to competitors and, ultimately, become a better employer.

HCAOA recently established a Data and Research Committee that has been charged with developing standard metrics to evaluate and prove home care's place in the health care continuum. Whether it is cost effectiveness, client safety and well-being, or consumer preference, home care's impact will be well-documented, and our place in this country's health care system will be cemented.

The Past, Present, and Future of Home Care

Earlier in the pandemic, home care agencies faced a variety of challenges, such as a lack of personal protective equipment, fear of COVID exposure by clients and caregivers alike, and caregivers unable to work due to lack of childcare. Fortunately, many companies found creative solutions to these challenges, but the industry continues to face other difficulties.



Like many Americans, some home care workers are struggling to access the COVID-19 vaccine. Here at the Home Care Association of America, we urged members to reach out to their state officials to include home care workers among the priority group for vaccine distribution. Caregivers play an essential role in the fight against coronavirus and deserved to be among the first to receive the vaccine like any health care worker. We also recognize that nearly 40 percent of frontline workers are hesitant to get the vaccine, so we have focused on providing education facts and resources to our member agencies and frontline workers about the vaccine.

As I write this message, there is a light at the end of the tunnel for the first time in a year. Vaccine distribution has not been perfect, but millions of shots are going into arms each day, and we celebrate that! HCAOA looks forward to the day that everyone who wants a vaccine can get one, and we can start finding our new normal. The world was forever changed by this pandemic.

The recent passing of the American Rescue Plan provides help to agencies and clients, including \$7.25 billion in new money for the small-business loan program; \$1.4 billion in funding for programs authorized under the Older Americans Act; and \$7.5 billion to the CDC to track, administer and distribute COVID-19 vaccines, which is desperately needed to move the country forward.

Another noteworthy element of the legislation is that the home- and community-based services Federal Medicaid Assistance Percentage payment boost was even higher than expected. Instead of a 7.35 percent hike to HCBS funding, the stimulus bill includes a 10 percent increase. The 10 percent FMAP increase means an additional \$12.67 billion for states' Medicaid funding for HCBS will start April 1 to May 31 of next year.

I came onboard as Executive Director of HCAOA just before the pandemic hit and drastically changed our lives. I continue to be proud and honored to represent the home care industry, especially as we have powered through



the COVID-19 pandemic. Throughout this crisis, home care organizations have repeatedly shown how they can offer care at the right time and in the right place. I have no doubt lives have been saved because of the work of our caregivers.

Thank you to Home Care Pulse for its continued support of the industry. There is so much we have accomplished together and even more that we can strive to do in the future. On behalf of the Home Care Association of America, I look forward to continuing our partnership as we emerge stronger out of this pandemic. 🏠

Sincerely,

Vicki Hoak
Executive Director

ABOUT THE AUTHOR

Vicki joined HCAOA as Executive Director in November of 2019, following a stellar 19 years in charge of the Pennsylvania Homecare Association. As Executive Director, Vicki sets the Association's strategic direction and leads the charge for the industry on a number of key professional and policy issues. Vicki holds a bachelor's degree in communications from Shippensburg University. She has been active in several professional and policy organizations on a volunteer basis.

Sales & Marketing

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- 22 Median Sales Close Ratios & Numbers
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- 25 Median Client Growth Rates
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SUMMARY

SALES & MARKETING

The Sales and Marketing section contains a wide array of information about client acquisition, including the top channels for consumer marketing and referral marketing. Home care agencies use a variety of strategies and channels to find new clients; this section dissects the use of these strategies and helps provide insight into the marketing methods that are available.





MARKETING SOURCES

2.1 2020 Top 20 Marketing Sources - Overall

Source	% of Participants	Median % of 2020 Revenue*	Median Revenue**	Median Client Acquisition Costs**	Inquiry to Admission Ratio**
Industry - 2020	N/A	N/A	\$1,958,000	\$595	30.0%
Clients - Past/current clients and their family/loved ones	20.6%	20%	\$1,800,000	\$588	30.3%
Internet - Search Engine Optimization (consumers can find you online)	6.0%	19%	\$2,000,000	\$684	30.2%
Caregivers/Employees	5.8%	16%	\$1,631,000	\$490	36.0%
Healthcare Professionals - Assisted Living Facilities	5.1%	18%	\$1,946,000	\$745	36.4%
Healthcare Professionals - Home Health Agencies (Medicare Certified)	4.9%	17%	\$1,887,000	\$501	37.6%
Healthcare Professionals - Hospices	4.8%	18%	\$1,843,000	\$638	32.9%
Healthcare Professionals - Hospital discharge planners	4.6%	19%	\$2,638,000	\$877	30.6%
Internet - Google Ad Words/Pay Per Click	4.4%	22%	\$1,875,000	\$818	30.1%
Internet - Corporate Web Leads (i.e. Franchisors Website, etc.)	3.0%	20%	\$2,009,000	\$480	34.4%
Government - State Medicaid Waiver Programs	2.6%	N/A	\$2,500,000	\$473	40.7%
Healthcare Professionals - Skilled nursing facilities	2.6%	19%	Survey participants were asked, "Select your top five revenue-generating marketing sources in 2020. Then select the percentage of 2020 annual revenue for which each top method was responsible." * Median Percent of 2020 Revenue shown here represents the percentage of revenue that came from a given source. ** These data points represent the median revenue, client acquisition costs, and inquiry-to-admission ratio for agencies who listed each given source as a top revenue-generating source.		
Internet - Facebook	2.4%	13%			
Government - Area Agency on Aging Case Managers	2.3%	32%			
Internet Lead Sites - A Place for Mom	2.2%	18%			
Healthcare Professionals - Independent living facilities	2.0%	15%			
Veterans Affairs (VA)	2.0%	26%			
Internet Lead Sites - Caring.com	1.8%	17%			
Healthcare Professionals - Rehabilitation hospitals (inpatient)	1.8%	18%			
Government - Veterans Administration Programs	1.7%	20%			
Other Marketing Source	4.8%	22%			



MARKETING SOURCES

2.2 2020 Top 10 Marketing Sources - Masters

Source	Percent of Participants' Top Source	Median Percent of 2020 Revenue
Clients - Past/current clients and their family/loved ones	18.4%	18%
Healthcare Professionals - Hospital discharge planners	7.7%	N/A
Internet - Search Engine Optimization (consumers can find you online)	7.2%	12%
Caregivers/Employees	6.3%	12%
Healthcare Professionals - Assisted Living Facilities	5.3%	N/A
Government - State Medicaid Waiver Programs	4.8%	N/A
Government - Area Agency on Aging Case Managers	4.3%	N/A
Internet - Google Ad Words/Pay Per Click	4.3%	N/A
Healthcare Professionals - Skilled nursing facilities	3.9%	N/A
Other Marketing Source	8.2%	25%

Masters represent those providers who billed \$5M+ in annual revenue in 2020.

Other Marketing Sources

This list provides some additional and lesser-known sources of new home care clients that you may like to review.

ADVERTISING

- Brochures (local restaurants, mailbox drops)
- Local Newspaper
- Mailers
- Radio

COMMUNITY RESOURCES

- Indigenous Tribes
- Local Alzheimers Support
- Local Church
- Local Senior Center

HEALTHCARE PROFESSIONALS

- ALS Association
- Auto Case Managers
- Care Managers
- Doctor's Offices
- Geriatric Care Managers
- Hospice
- Hospitals
- Long-term Care Insurance
- Medicaid MCO Case Managers
- Other Case Managers
- Parish nurse
- Workers Compensation Case Managers

INTERNET

- 5 Star Reviews
- carepathways.com
- NextDoor Recommendations (not ads)
- agingcare.com
- Care.com
- LinkedIn
- Website

NON-HEALTHCARE PROFESSIONALS

- Financial Managers & Legal Advisors
- Insurance Agents

OTHER

- Competitors
- Corporate
- Employees
- Neighboring Franchise Offices

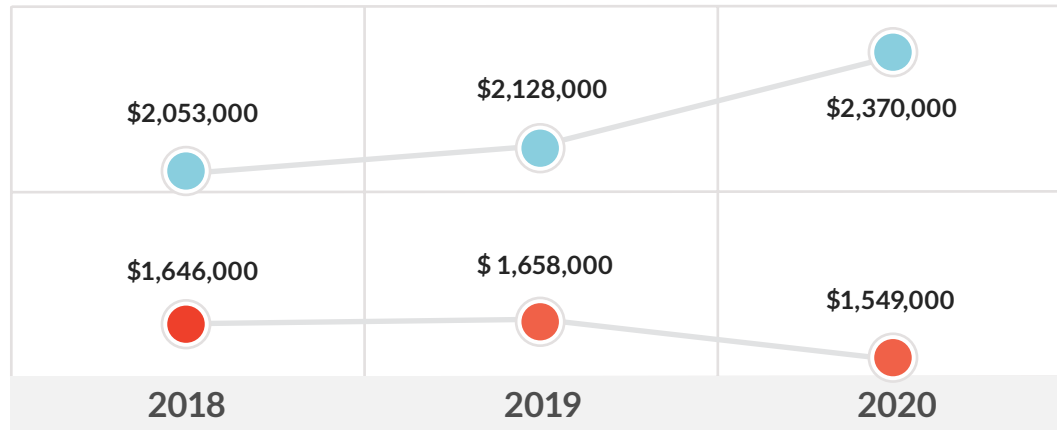
STATE SERVICES

- Social Service Organizations
- State Service Coordinator



INQUIRY TRACKING

2.3 Historical Inquiry Tracking Comparison - Median Revenue

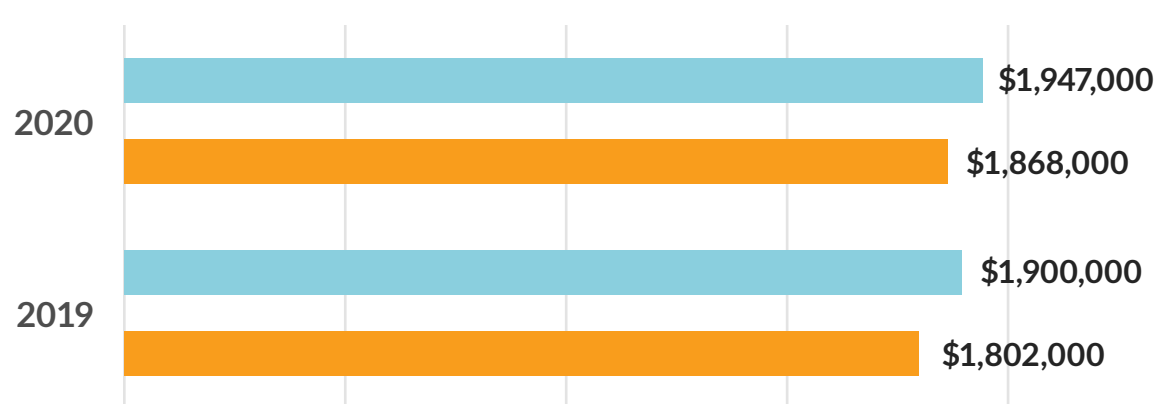


- Track Every Inquiry
- Do Not Track Every Inquiry

This graph shows the median revenue for those providers who track every inquiry about services versus those providers who do not track every inquiry about services.

INQUIRY TRACKING

2.4 Historical High vs Low Inquiry-to-Admission Ratio - Median Revenue



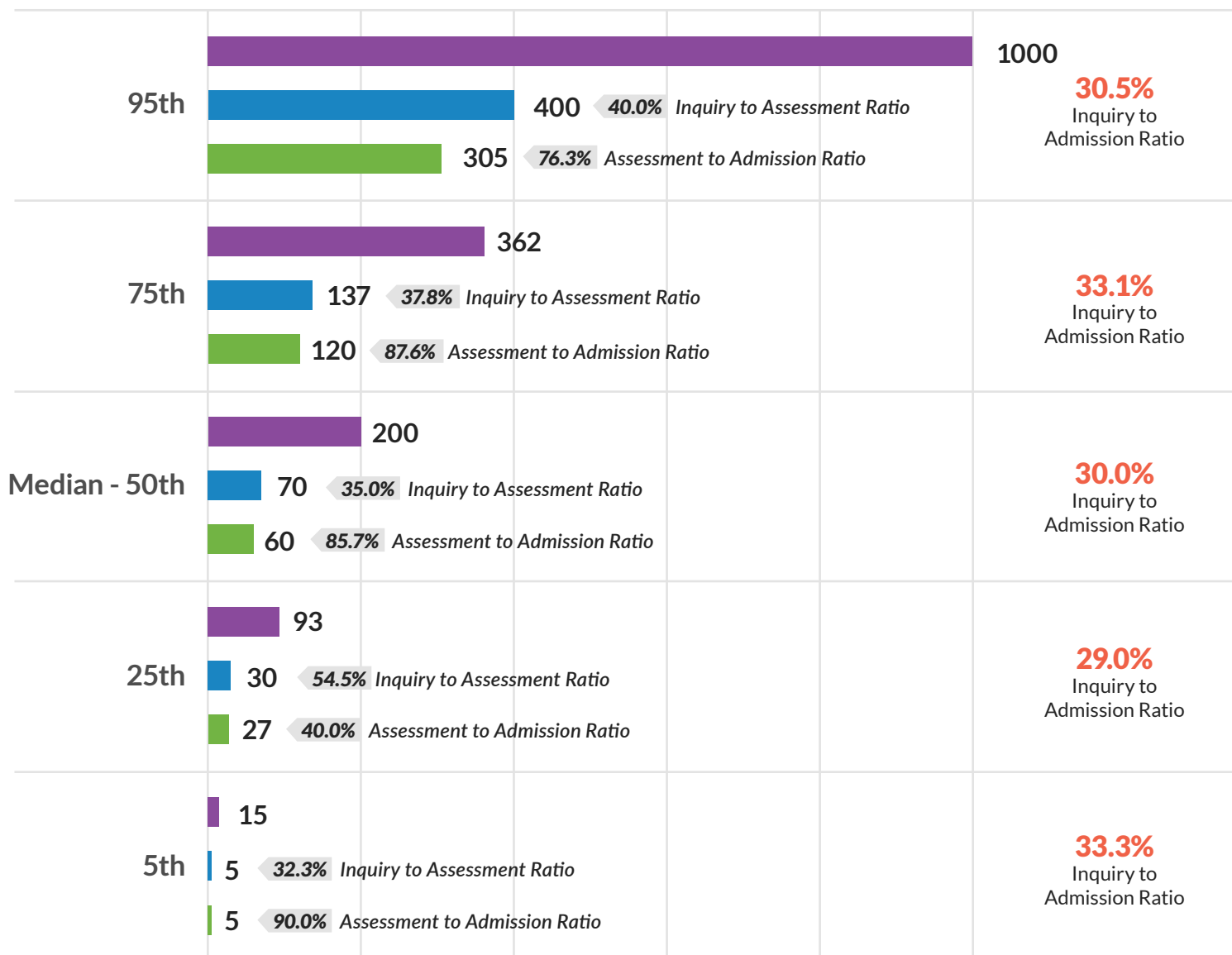
- 45%+ Ratio
- Less than 45% Ratio

This graph shows the median revenue for all agencies with an inquiry-to-admission (sales close) ratio higher than 45%, versus the median revenue for all agencies with an inquiry-to-admission ratio lower than 45%. It is designed to illustrate the impact that small improvements in sales close ratios have on total revenue.



MEDIAN SALES CLOSE RATIOS & NUMBERS

2.5 Median Sales Conversions for 2020 - Percentile Ranking



- Annual Inquiries
- Annual Assessments
- Annual Admissions

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

See next page for ratio definitions.

Inquiries – Individuals who called in for services and provided some kind of contact information, such as a phone number, address, and/or e-mail.

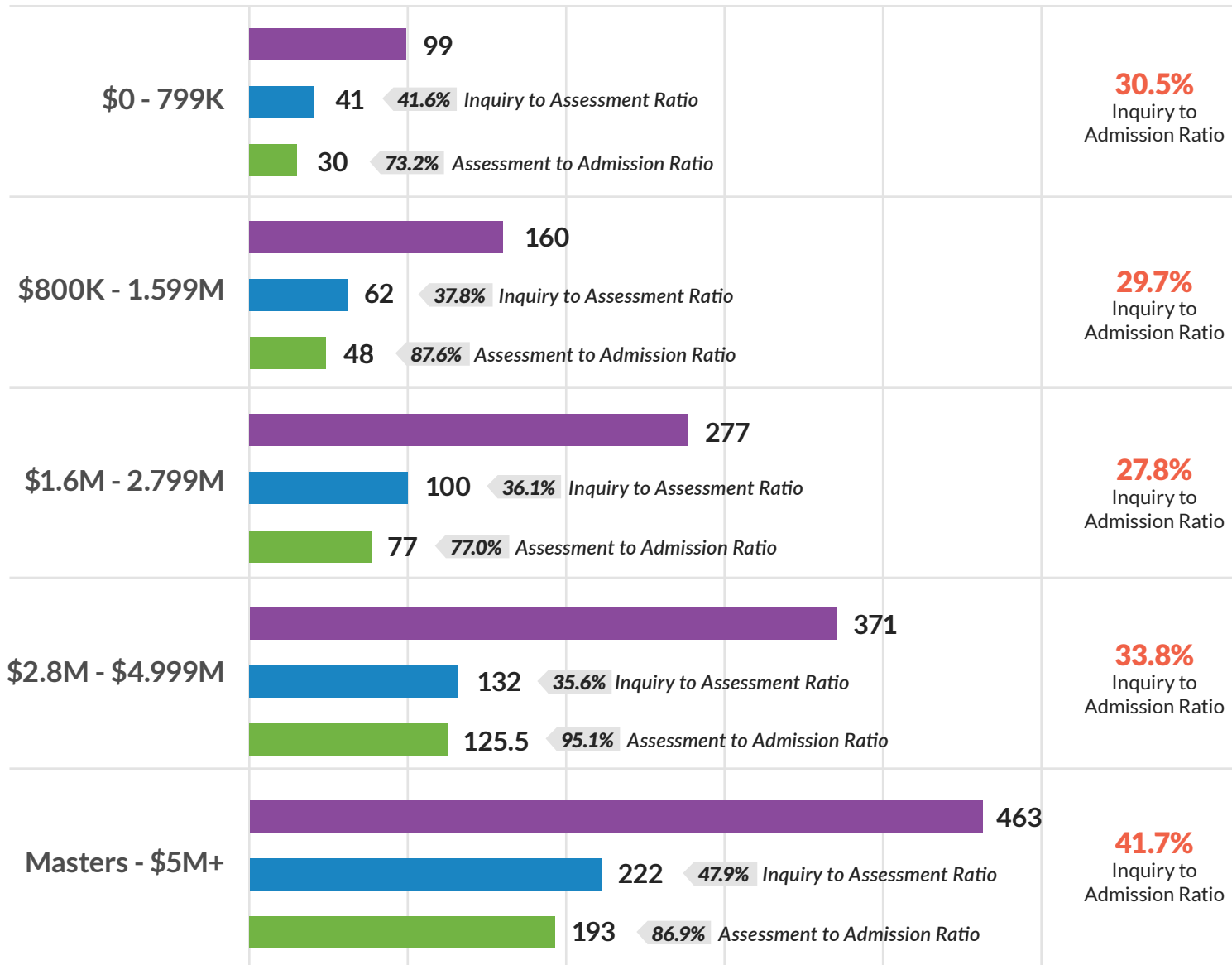
Assessment – A formal meeting to discuss the needs of the potential client, and the business's capabilities in meeting those needs.

Admissions – New clients who started services.



MEDIAN SALES CLOSE RATIOS & NUMBERS

2.6 Median Sales Conversions for 2020 - Revenue Ranges



- Annual Inquiries
- Annual Assessments
- Annual Admissions

Inquiry to Assessment Close Ratio – The percentage of prospective inquiry calls that turn into a performed assessment. (This number is found by dividing the number of performed assessments by the number of inquiries.)

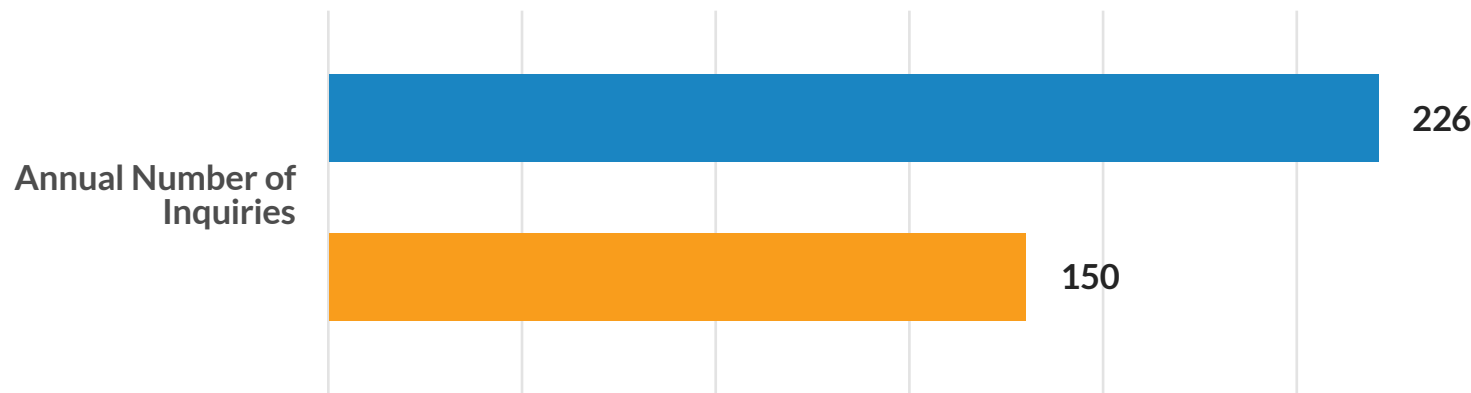
Assessment to Admission Close Ratio – The percentage of performed assessments that became actual clients. (This number is found by dividing the number of admissions by the number of performed assessments.)

Inquiry to Admission Close Ratio – This represents the percentage of service inquiries that became actual clients. (This number is found by dividing the number of admissions by the number of inquiries.)



MEDIAN SALES CLOSE RATIOS & NUMBERS

2.7 Annual Sales Close Conversions - Home Care Pulse® Experience Management Users vs. Non-Users



- **Use** Home Care Pulse Experience Management
- **Do Not Use** Home Care Pulse Experience Management

Along with publishing the Annual Home Care Benchmarking Study, Home Care Pulse also provides client and caregiver experience management services specifically designed for home care agencies.

To learn more about how the Home Care Pulse Experience Management (Previously “Experience Surveys”) Program can help your business grow, visit us at homecarepulse.com or contact us at (877) 307-8537.

Understanding the Data

While there are various ways to interpret this data, at least part of the gap shown here is due to the ways that experience data can help to generate more inquiries. Agencies enrolled in the Home Care Pulse Experience Management Program are encouraged to use their data in meetings with professional referral partners; those that do so often report that this provides a clear competitive edge in securing partnerships.

Explaining The Gap

Agencies using Experience Management are using their results as proof of quality care to attract and earn more business and enhance their reputation, including more and better online reviews, more word of mouth from loyal clients, and interest due to Best of Home Care awards.



GROWTH OPPORTUNITIES

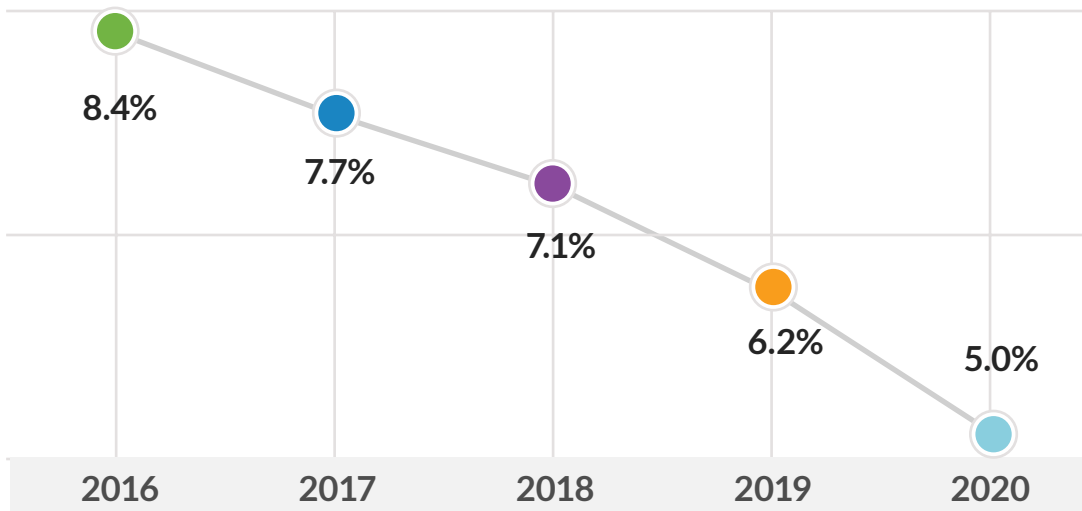
2.9 Top 5 Growth Opportunities for 2021

Rank	Top Growth Opportunities	Percentage	Change from Previous Year
1	Caregiver recruitment and retention program	32.2%	▲ 13.7%
2	Strengthening relationships with referral sources	20.6%	▼ 9.5%
3	Company expansion into a new market(s)	6.1%	▲ 0.2%
4	Increasing client referrals by improving client satisfaction	5.4%	▼ 1.7%
5	Company acquisitions	4.2%	▼ 1.3%

Survey participants were asked, "What do you see as your number one growth opportunity in 2021?"

MEDIAN CLIENT GROWTH RATES

2.8 Historical Median Client Growth Rates

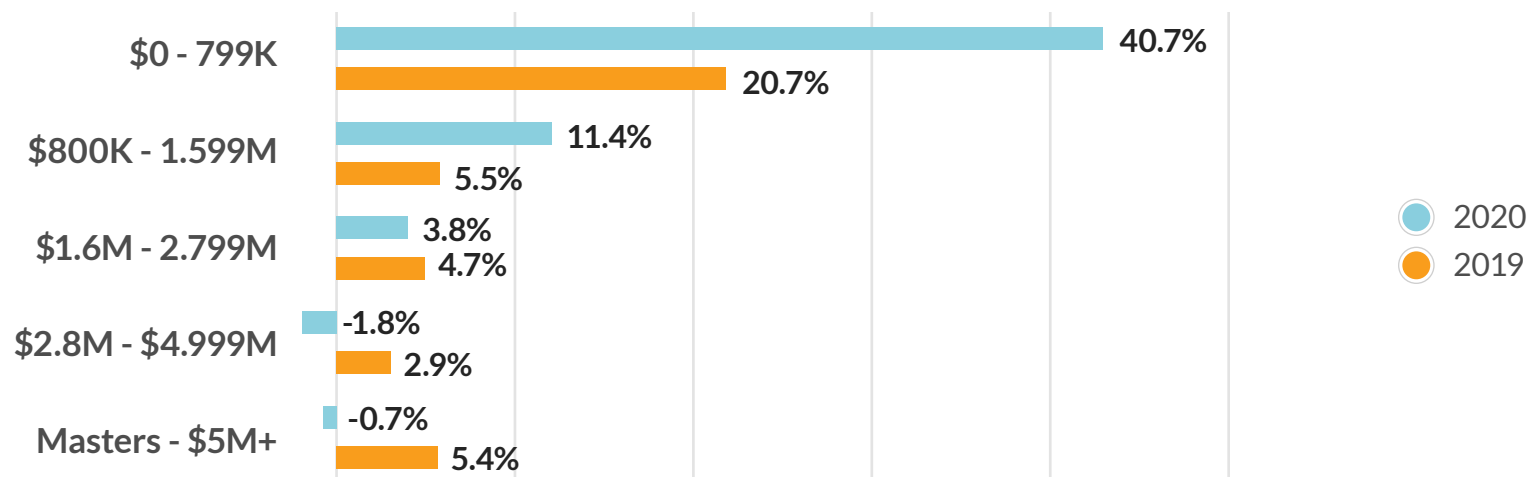


Client Growth Rates are median growth rates from December 31, 2019 to December 31, 2020. It is important to understand that the smaller the agency, the easier it is to increase the percentage of client growth. For example, if an agency has 20 clients and grows to 30 in a year, they have achieved a 50% client growth rate. However, if an agency has 200 clients and grows to 210 clients (adding the same number of clients as the smaller agency) their growth rate is just 5%.



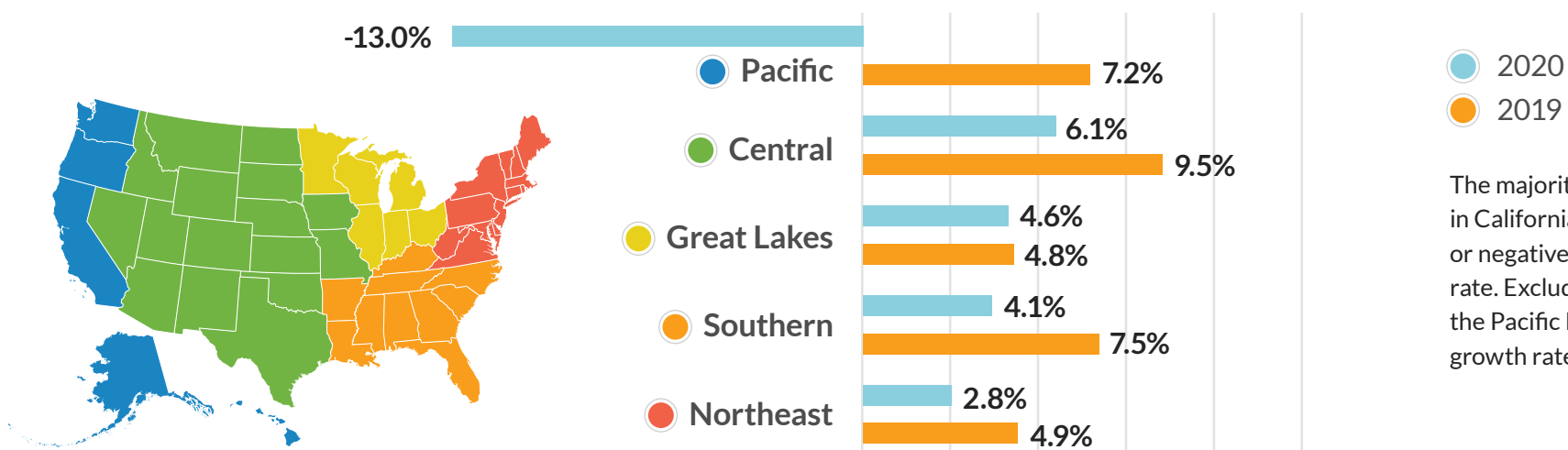
MEDIAN CLIENT GROWTH RATES

2.10 Median Client Growth Rates - Revenue Ranges



MEDIAN CLIENT GROWTH RATES

2.11 Median Client Growth Rates - Geographic Region



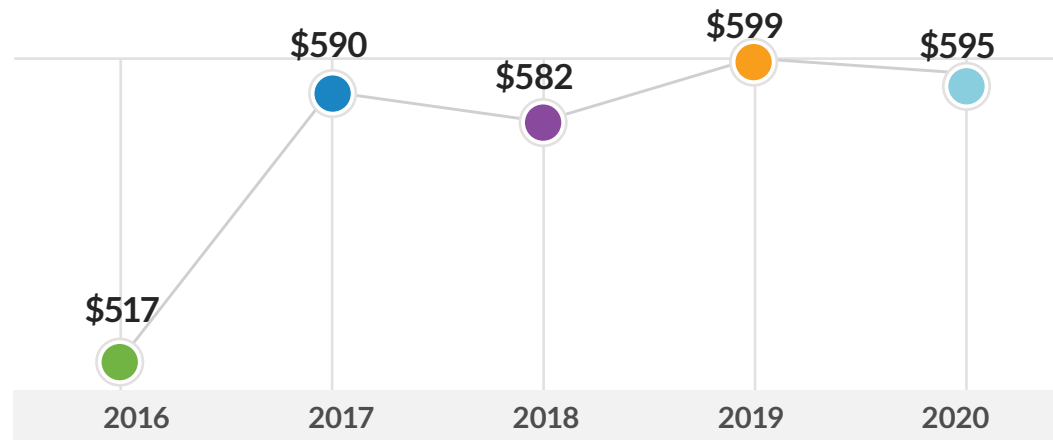
The majority of providers in California reported a 0% or negative client growth rate. Excluding California, the Pacific Region had a growth rate of 5.6%.



MEDIAN CLIENT ACQUISITION COSTS

Median Client Acquisition Costs displays the cost of acquiring new clients in 2020. To calculate your client acquisition costs, add up your total sales and marketing expenses (including salaries and commissions associated with sales and marketing). Then, divide this total dollar amount by the number of new clients (admissions) you brought on service the same year. When considering different sales and marketing strategies, it is important to consider the impact these strategies will have on your average acquisition costs compared to this benchmark.

2.12 Historical Median Client Acquisition Costs

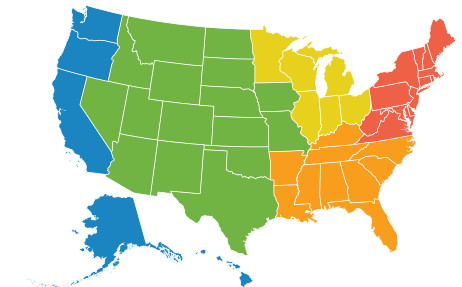


MEDIAN CLIENT ACQUISITION COSTS

2.13 Historical Median Client Acquisition Costs - Geographic Region



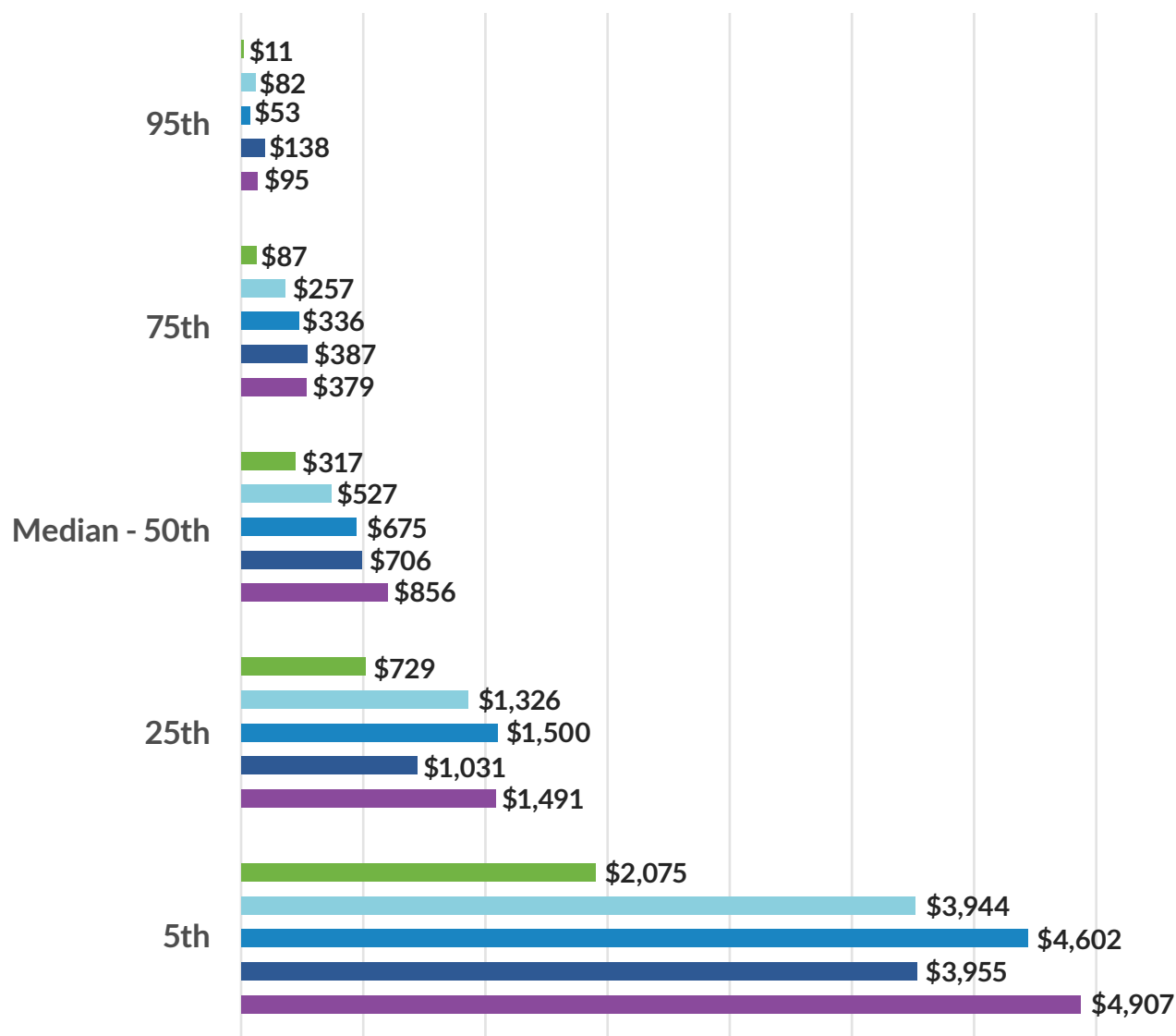
2020
2019





MEDIAN CLIENT ACQUISITION COSTS

2.14 Client Acquisition Costs for 2020 - Percentile Ranking



- \$0 - 799K
- \$800K - 1.599M
- \$1.6M - 2.799M
- \$2.8M - \$4.999M
- Masters - \$5M+

In some past editions, this graph has placed high client acquisition costs in high percentiles and low client acquisition costs in correspondingly low percentiles. We've switched this order to reflect the fact that high percentiles are typically used to show desirable rankings or outcomes, i.e. low client acquisition costs.



Steve “The Hurricane” Weiss

President & CEO | Hurricane Marketing Enterprises

ARTICLE

The Final Push: When To Exit Your Business

After having survived the COVID-19 pandemic and dealing with all the challenges and regulation changes, many home care business owners are exhausted. With the national push for a \$15 minimum wage increase and other changes on the horizon, more and more agency owners are thinking about moving on to the next chapter in our lives. We are burned out. We are constantly in “firefighter mode” putting out daily fires. We never get a real day off. We are done! If this is you, then grab a pen and paper to take notes. (If not, know that one day this day is inevitably in your future.)

Back in 2010, I began my exit. The primary reason was I was getting too involved in the business and spending less time with my patients, which is something I love doing. Second, I wanted to leave an impact on the industry and help others duplicate and exceed the levels I had achieved. Meeting with potential buyers, due diligence process, the anxiety of my staff, and more are all challenges and memories I will never forget. I also remember it wasn't something that just happened; rather, we prepared for it years in advance. With that in mind, as you go about planning your next 2 to 5 years in business, here are several items you must consider:

Profit – When it comes to business valuations, one thing will stand out more than anything else, and that is profit margin. Currently, based on the most recent Home Care Pulse data, most businesses are operating at a 5-10% profit. That is too low if you want maximum return on your investment. Most

buyers are going to want (and will pay top dollar for) a business that's returning 20% or greater returns.

3-Year Look Back – Many buyers are going to want to see what your revenue was year over year for about 3 years (some as much as 5) The key to focus on is making sure you are showing significant revenue growth year over year as this shows no signs of “leveling off” or “slowing down.” I try to have people focus on at least 25% revenue growth year over year.

Longevity of Staff – As mentioned above, your office staff will initially be terrified. People don't like change, and this is a forced change. That said, if you can show that your staff are competent and efficient at following strong business practices, that will certainly add to the value as most people looking to buy a business don't want to replace everyone who was running this business. You can easily prepare your staff for interviews with potential new owners when the time is appropriate (and it'll be exciting to see them shine). Conversely, if your office is a turnover machine, you need to make improving your staff retention your highest priority!

Referral Source Development – While it is never a guarantee that referral sources will continue to refer, if you can show strong referral source development (meaning consistent year over year referrals), your business is more valuable because of the inherited potential to generate new revenue.



Transition Period – Many business owners coming in are willing to have and desire the previous owner stay on for a predetermined period of time. There are many ways to do so that I will not be able to get into right now, but in general, if an owner is willing to stay on to transition the business, it will make the entire process go smoother for all parties involved.

Looking back on the last 9 years of my life after exiting my home care business, I know it was 100% the right decision for me. I have been able to build my current business Hurricane Marketing Enterprises and accomplish so many goals that were mere dreams. Every staff member from then has gone on to bigger and better futures from our time together. So, in closing, whether you are looking to exit your business today, in the next 3 to 5 years, or it's not even a thought at this point, it is smart to plan and prepare for the inevitable. As we build our businesses, keeping these points in the back of our minds will make it so that when we do decide we are ready for the final push, we have all our ducks in a row. 🏠

ABOUT THE AUTHOR

Steve “The Hurricane” Weiss is a dynamic and entertaining public speaker, known for his expert knowledge in all things sales and marketing. From a young age, Steve has been driven to succeed, and excelled across vastly different industries. Steve founded his current company, Hurricane Marketing Enterprises, in 2012 with a goal to help other business owners across the country. In a few short years, he grew it to a seven-figure business and it has been booming ever since.

Steve’s passion is to lead business owners on the path to find people in need of their services and convert these prospects into clients. His company’s mission statement is to help business owners increase their

census, revenue, and profits. Through his programs and presentations, he has guided thousands of individuals to grow their organizations and continues to help them blow away the competition.

With his dedication and hard work, Steve has developed a foolproof program which enables start-up companies to quickly get ahead of the competition while helping existing business experience an explosive transformation. Many of his clients double and even triple annual revenue in as little as 6 months.



corecubed
AGING CARE MARKETING



Marissa Snook

President/CEO | **corecubed**

ARTICLE

Maximizing Marketing Efficiencies for a Unified Sales Effort

Working with hundreds of home care agencies throughout North America, we at corecubed have a unique view into how marketing is approached throughout the industry. Often, agencies invest in quality marketing materials but fail to use these materials to their maximum potential, resulting in a poor return on investment.

By employing the following key marketing strategies, agencies can improve their efforts and ultimately contribute to a higher sales conversion rate:

1. Move from a siloed approach to sales and marketing to a synergistic approach
2. Understand what potential clients and their loved ones want to learn more about before creating content
3. Create all content with multiple channels and audiences in mind
4. Let your metrics guide your next steps

Maximizing your marketing and sales efforts isn't about producing more marketing and sales materials—rather, it's about creating meaningful, researched content that is utilized by your entire team and leveraged across multiple marketing channels. The goal is to produce content that provides value for both new and existing clients.

Break the Siloed Mindset

Too often, agencies employ a siloed approach to sales, marketing, and inquiry call management. Each team functions independently with little

interaction, inadvertently missing opportunities to share resources the agency has created, or learn from each other what they are hearing in their interactions with potential clients and referral sources that could point toward potential content opportunities. Siloed approaches to sales and marketing may include:

- A home care agency writes regular blog posts rich in helpful and meaningful content related to common senior health issues and difficult family caregiving situations, but their salesperson never reads the blog so doesn't think to offer it as a resource to the referral sources he or she is contacting.
- An agency has produced a helpful resource explaining the signs that care may be needed, but when a potential new client calls the office looking for help, the staff member on the call never thinks to ask the caller if they would like the resource emailed to them.
- The marketing team puts out social media posts on a regular basis that they think provide information family caregivers want, but they never ask the staff members fielding inquiry calls what they hear are the most common hurdles to starting care or most prevalent health issues driving the need for care, nor does the content team ask management about the most prevalent diagnoses of current clients.



Instead of a siloed approach, a unified team will do the following:

- The sales team truly listens to what referral sources are saying and regularly shares this information with the entire team, such as:
- Specifics about the demographic(s) they refer to the agency
 - The particular care needs that their clients/patients need assistance with
 - The current challenges or obstacles to starting care
- The inquiry team is trained to actively listen to people who call seeking information about care and regularly share what they are hearing from potential clients, including:
 - What questions callers ask most frequently
 - What conditions the callers' loved ones are experiencing that makes home care a need
 - How callers are hearing about the agency
- The marketing team creates content based on feedback from management, sales, and the inquiry management team, resulting in website content that is relevant and meaningful and can be used by referral sources as well as existing and prospective clients.

A siloed approach is very common across most industries; in fact, a [2020 study conducted by LinkedIn](#) found that 97% of sales and marketing professionals report facing challenges with alignment on content and messaging between the two areas. But the same report indicates that 87% of sales and marketing leaders say collaboration between sales and marketing enables critical business growth, making the goal of a unified approach challenging but worthwhile. When done right, a unified marketing and sales approach can be up to six percent more likely to exceed revenue goals than teams working less in alignment ([Forrester, 2019](#)).

Create Content with Your Client in Mind

People looking for home care usually need to be educated about the types of services and payment options available. They typically do not understand the difference between non-medical home care, home health care, hospice care, and how any of these services are paid for. Often, they are the adult child of a senior and are beginning to suspect, or fully know, that mom or dad can no longer live safely without assistance. They typically have little time, don't know what to do to help their loved one, and may be living at a distance. Inquiry callers are looking for a source of reliable information that can explain options for care, offer tips to help best manage a chronic illness or difficult behavior, and connect them to additional resources—all while providing needed empathy.

Good content, whether in the form of written materials, videos or digital resources, provides potential clients with valuable information and guidance, positioning the agency that produces it as a trusted and reliable source. When you build an audience that trusts your agency and wants to hear from you, they are much more likely to engage with you for home care services when they are ready to buy. Likewise, when a salesperson is able to provide a referral source with meaningful resources for that person's patients or clients, they are more likely to recommend your agency to their clients. Given that "strengthening relationships with referral sources" was ranked number one for the top growth opportunity in the 2020 Home Care Benchmarking Study, this seems like a worthy goal.

Good content is personalized to a particular person's needs. If someone calls your agency looking for help for a parent with dementia, follow-up the call by sending a flyer that explains the stages of dementia. Follow-up the next week with another resource specifically addressing dementia or their role as a family caregiver. This could also mean sharing details about an Alzheimer's support group in your area, a local agency that offers free transportation

for seniors, or any other number of helpful resources from which the family could benefit. Your agency is now not just a service trying to sell something, but a resource for the family that will help them make needed community connections.

Create Content with Multiple Uses

Many agencies create one-off content, meaning they invest in one blog post, brochure, sales piece or video and use it only for one intended purpose or one communication channel. This ad hoc approach to content creation is not efficient or cost-effective. Instead, employ a multichannel marketing strategy in which the work employed on one piece of content can be leveraged across multiple platforms and audiences.

The beauty of well-crafted, compelling content is that it can be molded and adapted to fit across a variety of channels. There is no need to create new content for every marketing effort; instead, write one new piece or update older material, then determine how and where you can use that content to reach as much of your target market as possible: post new content on your blog, then share the post across your social media platforms, include a link to the blog in your e-newsletter or eblast, or create a downloadable flyer that is housed on your website.

Think about how an educational piece can be slightly modified to use in the sales process with different types of referral sources, or how front office staff fielding inquiry calls can be trained to offer the same information over the phone and then follow up with an email that includes the piece.

Pay Attention to your Metrics

Metrics can provide valuable insight into who is calling your agency and what topics are of interest to them. Drill down to unlock details that can help make your marketing and sales strategies responsive and timely.



- Do you regularly monitor inquiry calls to learn the questions callers ask most frequently and to assess how your staff responds?
- Where do most of your referrals come from?
- What blogs are most popular on your site?



- Which of your social media posts have the most traffic?
- Do you monitor your primary competitors' websites, blogs, and social media pages?
- Do you track and monitor the most popular internet search terms that are used by those looking for senior care services?

If you don't have quick answers to these questions, you are overlooking valuable information that can inform your marketing and sales strategies. The key is to track and monitor the content individuals are looking for and to present your home care agency as the solution, both for current clients and families, as well as for referral sources and potential clients.

Developing a relationship with a marketing professional who can assist you in monitoring your company's metrics can be very helpful, as most agency owners/operators do not have the time available to invest in tracking all the variables listed above. Tools such as a call recording system like CallRail, Google Analytics, heat maps, Facebook Analytics, Google Trends, and more can provide valuable information and a robust picture of which marketing efforts are successful and what needs to be improved.

Moving marketing and sales efforts from a siloed approach to a collaborative approach helps ensure that home care agencies are meeting the needs of both existing and potential clients. By using metrics and prioritizing regular internal communication between teams to target both of these audiences, home care agencies can maximize their investment in marketing materials and stand out from the competition. 🏠

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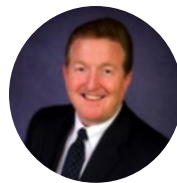
ABOUT THE AUTHOR

Marissa Snook, President/CEO, has been working in public relations and marketing for over twenty years with a focus on in-home care marketing since 2005. She has been instrumental in developing and managing corecubed's award winning home care marketing program, MOST. Specializing in digital and content marketing for aging care companies in all stages of growth, she leads an extraordinarily talented team whose bench strength includes decades of home care marketing experience, digital marketing degrees and content writing and search marketing certifications. To learn more about corecubed's services, call 800-370-6580 or visit us at www.corecubed.com.



ARTICLE

A Return to Good Sales Strategy

**Peter Droubay**

Director of Business Development & Training
caring.com



Times were changing rapidly in home care prior to COVID. More and more people were using the Internet to research available home care options in their area. Even those referred to you by a medical professional were likely to research your agency online before calling you. The primary information they sought online were the consumer reviews for your agency. In many areas, 30% of new business was coming in online by 2019. In some areas, the percentage of new clients that came from online sources had grown to 50%.

But then COVID poured gasoline on the fire. Professionals who work with seniors have been very cautious about referring people anywhere. For newer agencies, the inability to go and see potential referral sources in person has made it much more difficult to build these relationships. Even veteran agencies have found it difficult to maintain their referral network.

Without the normal referral network, there has been a steep rise in the number of families looking for home care online. Online leads have become the primary source of new business for many agencies, especially newer agencies that had not already created dependable referral relationships. Many agencies are struggling to bring in new clients while hoping things return soon to “normal.”

A Reality Check:

But here’s the reality: In many areas, it may never completely return to “normal.” Many referral sources have locked down access and will be very

slow to open back up. Trends that were already in play are growing, such as the fact that many hospital chains and healthcare organizations are seeking to get into the private duty home care market and are more and more reticent to refer business to agencies they don’t own. And more importantly, the adult children looking for care for their parents are increasingly members of the generations that turn to online resources first: The Gen Xers and the Millennials. **Like it or not, the future of the industry includes a lot of online inquiries and leads.**

Unfortunately, many agencies are unprepared for the change in sales strategies that it takes to work Internet leads and be very successful with them. Let’s face it, many of us have gotten lazy because of the ease of converting most referrals into clients. Our systems and our staff are not very sales oriented because there was very little selling required. We spent all of our time and sales efforts building relationships with professionals who told their clients to use our services. When those clients called us, they were 90% sold on us and on home care as the preferred option. As long as we didn’t completely mess up the intake, they were ready to start service with us.

In fact, many agencies went so far as to have people answering their phones who had very little training and very low sales IQ. They simply had to be nice because they were, in essence, order takers. In fact, many agencies I know went so far as to transact most, if not all, of their initial intake over the telephone. And why not? In a world where the sale is already made, and the customer



has already decided to use your services, the correct thing to do is to simply take their order.

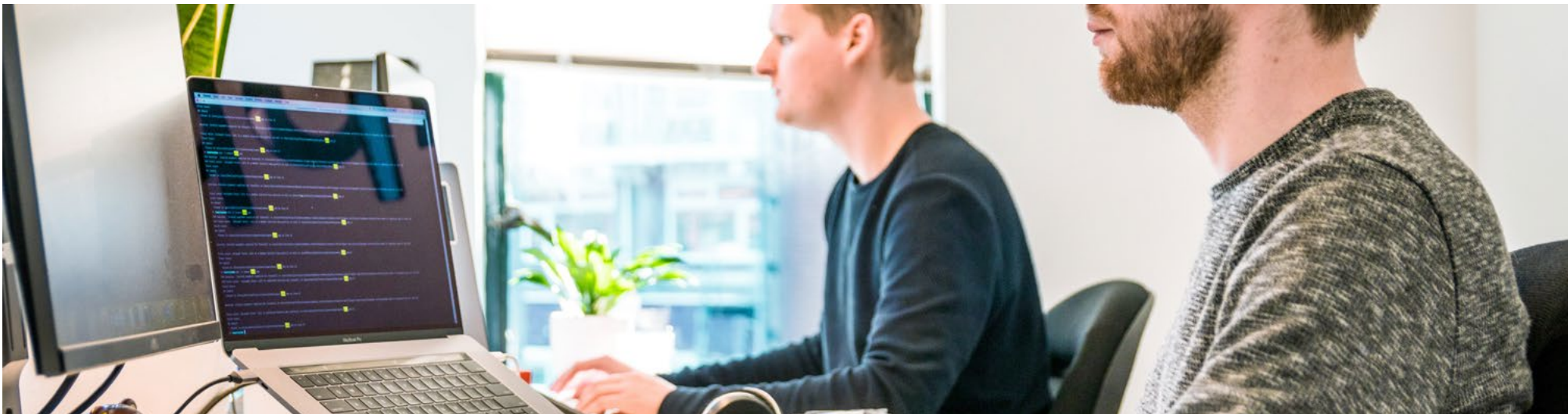
But now the tide has turned, and many agencies are struggling to convert Internet leads. They are shocked and upset when they realize that very few are buying from them simply because they are nice.

It's time to get back to sales basics!

People who look for services on the Internet are shoppers. They are comparing you to your competitors. Their need is no less urgent, but they know they have options, and they want to make sure they are making the right decisions. If you do not have a proven sales system in place with the right people who have good sales skills, then it is time to change.

Ask yourself the following questions:

- What are people's first impressions of my agency when looking in online directories, social media, and websites?
- What do online consumer reviews say about my agency? Compared to my competitors, do I have more or better reviews?
- Do I have ways to generate inquiries and leads from the hundreds of people searching for services online?
- Do I have a step-by-step sales process that everyone in my agency understands?
- When my agency does get an inquiry or lead, how is it handled? Do I have the right people handling that call?
- Do I have proven scripts for the initial calls that everyone in my business uses?
- Does everyone understand that the purpose of the initial call is not to explain everything or sell our services immediately? Do they understand that the purpose is to build rapport and set a time for an in-home visit?
- Does my staff know how to answer questions and handle objections in ways that lead to appointments for in-home visits? Do we practice and role-play those scenarios?
- Am I measuring the number of calls and the percentage of times that in-home visits are set? Is that a metric that is constantly talked about and pursued in my business?
- Are we pushing for those initial appointments, just like a great sales team pushes for more sales appointments? Or are we over-qualifying on the telephone because we are afraid of going to any appointment that is not guaranteed to start service with us?
- Are my in-home visits true client assessments that explore the reasons they need care? Are we truly understanding the emotions that will compel families to use our services?
- Do I have the right people conducting those in-home assessments? Do they have training in more than just the clinical aspects of the business? Do they truly know how to sell?
- Do I have scripts and forms for my in-home assessments?
- Is there a specific script and process for building a care plan and asking for the order? When we do ask for the order, are we closing the sales on-site?
- Am I measuring the completion of in-home assessments and the conversion rate?





- Are all of the metrics known by everyone in the business and discussed weekly, just like a great sales team does?
- Do I measure the effectiveness of my online marketing based on the ROI? Does my staff understand the numbers and percentages that lead to a positive ROI? Or do they complain and want to quit the program every time a lead does not turn into a client?

I could go on with many more questions, but the biggest one to ask yourself is:

“Is my organization serious about selling in the most effective ways possible?”

If you are not serious about sales, then you will find it increasingly difficult to compete. Those who are serious about it will win most of the business from families looking for care online. And the numbers that are looking online for home care are growing rapidly and will continue to grow for many years to come.

Caring.com and its affiliate websites are the most visible sites for senior care. We work with thousands of agencies to give them an enhanced presence online, grow their consumer reviews, manage their online reputation, and send them leads: People looking for home care in their area. In addition, we also offer training for our clients, which may be the most important offering of all. Let us

share with you some of the best practices for converting online leads into clients.

Decide now to develop an outstanding sales culture in your agency. Participate (at no cost) in the Caring.com Digital Marketing Academy for more sales and marketing training for yourself and your staff. 🏠

REFERENCES

2020 Home Care Pulse Benchmarking Study - Pages 19-21

Generational cohorts: <https://www.kasasa.com/articles/generations/gen-x-gen-y-gen-z>

ABOUT THE AUTHOR

Peter Droubay has over 25 years of experience as a sales trainer and growth expert. He's conducted over 4,000 training classes, seminars, and events, authored dozens of corporate training programs currently in use, and helped build companies such as The Senior's Choice, Hallmark Homecare, and Salestrainer.com. Since he joined Caring.com, he oversees the hiring and training of their team of Family Advisors.



Recruitment & Retention

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Executive Summary

Sales & Marketing

Recruitment & Retention

Finance

Operations

Technology

Client/Caregiver Experience

Best of Home Care



SUMMARY

RECRUITMENT & RETENTION

As caregiver shortages become an ever-increasing issue in the industry, it's more important than ever to take a data-driven approach to staffing that helps minimize turnover costs, focus on the optimal recruitment sources, and save time and money wherever possible.

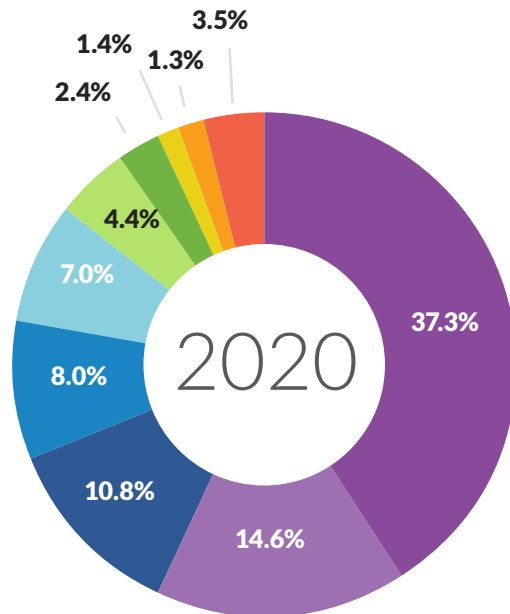
The data in this section is designed to help you understand what other agencies are doing to succeed, which practices are most common, and which challenges are most relevant to your geographic region. It also provides information to help analyze competitive offerings for benefits and types of training that are being offered, enabling you to create your own unique strategy for improving the caregiver experience.





RECRUITMENT SOURCES

3.1 Top 10 Caregiver Recruitment Sources/Methods for 2020



Rank	%	% Difference	Source/Method
1	37.3%	▲ 2.8%	Internet - Indeed.com (Free & Paid Plans)
2	14.6%	▲ 2.5%	Employees - Current Employees (Employee Referral Program)
3	10.8%	▲ 3.6%	Internet - Social Media (Facebook, Twitter, LinkedIn, etc.)
4	8.0%	▲ 0.1%	Internet - myCNAjobs.com
5	7.0%	▼ 0.5%	Referral Sources - Word of Mouth (Reputation)
6	4.4%	▲ 0.5%	Internet - Your Website
7	2.4%	▼ 2.4%	Internet - Craigslist.org Job Ads
8	1.4%	New	Internet - Care.com
9	1.3%	New	Employees - Reactivation of Previously Employed Caregivers
10	3.5%	New	Other Recruitment Source

From a list provided, survey participants were asked to select their top two **most effective** caregiver recruitment sources and methods used in 2020.



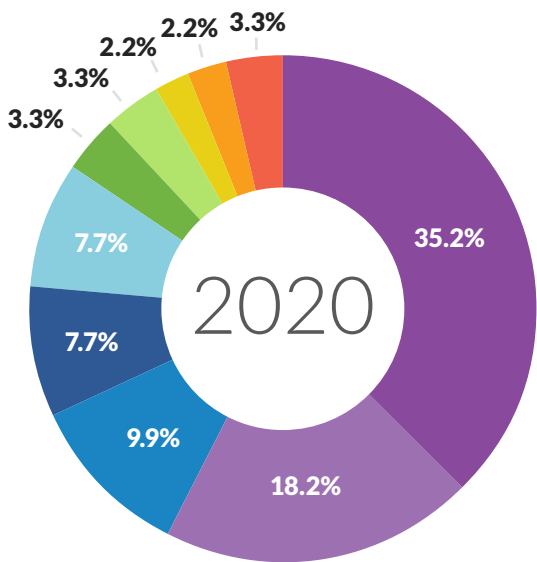
Attract Top Caregivers

The best caregivers want to work for quality home care providers. Use client and caregiver testimonials, satisfaction scores, Best of Home Care awards, and other resources to attract quality caregivers to your business. Learn more on [page 161](#).



RECRUITMENT SOURCES

3.2 Top 10 Caregiver Recruitment Sources/Methods for 2020 - Masters



Rank	%	% Difference	Source/Method
1	35.2%	▲ 6.5%	Internet - Indeed.com (Free & Paid Plans)
2	18.7%	▲ 2.7%	Employees - Current Employees (Employee Referral Program)
3	9.9%	▲ 3.5%	Internet - Social Media (Facebook, Twitter, LinkedIn, etc.)
4	7.7%	▲ 4.5%	Internet - myCNAjobs.com
5	7.7%	▼ 1.9%	Referral Sources - Word of Mouth (Reputation)
6	3.3%	▼ 4.1%	Internet - Your Website
7	3.3%	▼ 3.1%	Internet - Craigslist.org Job Ads
8	2.2%	New	Internet - Care.com
9	2.2%	New	Employees - Reactivation of Previously Employed Caregivers
10	3.3%	New	Other Recruitment Source

From a list provided, survey participants were asked to select their top two **most effective** caregiver recruitment sources and methods used in 2020. Masters represent those providers who billed \$5M+ in annual revenue in 2020.

See **page 41** for a complete list of other recruitment sources/methods.



RECRUITMENT SOURCES

Recruitment Sources/Methods

This list is a compilation of the other great caregiver recruitment sources that providers have indicated they use. It can be a great resource if you're looking for other ideas of where you might try and recruit additional caregivers. Options submitted under "Other" for the 2021 survey are highlighted in red.

ADVERTISING

- Church or Faith Based Newspaper
- **Corporate TV Ads**
- Daily Newspaper Classified Ads
- Direct Mail Flyers
- Direct Mail Post Cards
- Ethnic/Foreign Newspapers
- Outdoor (billboards, benches, signs, etc.)
- Penny Saver/Thrifty Nickel or other free local paper
- Radio - Christian or Faith Based Stations
- Radio - Music Stations
- Radio - Talk Stations
- Regional Newspapers
- Senior Directory Ads
- Signs or Banners on Your Building
- Television - Cable/Satellite Stations (ABC, NBC, CBS, FOX)
- Television - Public Broadcasting Station (PBS)
- **Texting Program**
- Weekly Newspaper Classified Ads
- **Yard Signs placed at Intersections**
- Yellow Pages - ONLINE

COMMUNITY

- Chamber of Commerce
- Church Clergy and Administrators
- Community Articles, etc.

- Community Caregiver Training
- Four-Year Universities
- Hair Dressers and Beauty Salons
- Health Fairs
- Job Fairs
- Junior or Community Colleges
- **Local Schools**
- Speaking Engagements
- Sponsorships (i.e. Alzheimer's Walk, etc.)
- **Vocational, Technical, or Trade Schools**
- Work Force Services Local Office

INTERNET

- Care.com
- Career Builder
- Careerguru.com
- **CareerPlug**
- CaregiverHR.com
- Caregiverlist.com
- **CareinHomes.com**
- Company Blog
- **Craigslist.org Job Ads**
- Email Campaigns to Referral Sources
- **Facebook**
- GenerationsUnite.com
- **GetHired.com**
- Google Ad Words/Pay-per-Click
- **Healthcare Source/Vikus**
- Hotjobs.com

- **Indeed.com**
- Jobing.com
- Jobs.com
- Jobsinme.com
- Jobs-to-careers.com
- LDS Employment Services
- Local Career Websites
- Local TV Station Website Board
- Monster.com
- myCNAjobs.com
- Snagajob.com
- **Social Media (Facebook, Twitter, LinkedIn, etc.)**
- **Werkberry**
- Workforce Services Website
- Yahoo! Jobs
- **Your Website**
- **ZipRecruiter**

JOB BOARDS

- College Job Boards
- Community Center Boards
- Grocery Store Job Boards
- **Hireology**
- Library Job Boards
- Workforce Services Job Board

OTHER

- **Corporate Office**
- **Full-Time Recruiter**
- **Personal Visits to Patients in Facilities**

- Reactivation of Previously Employed Caregivers
- **Walk ins**

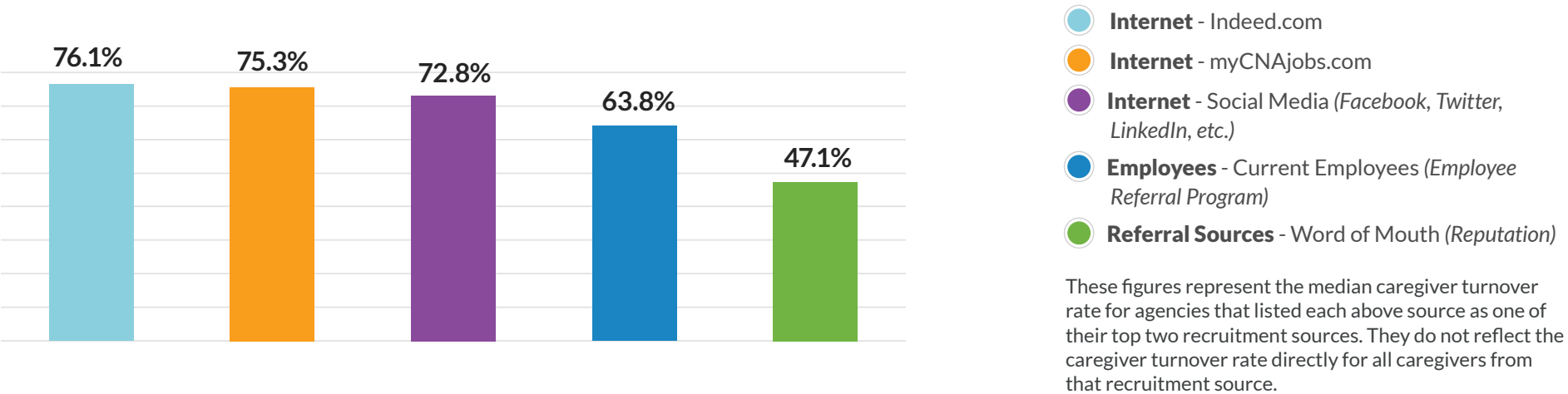
REFERRAL SOURCES

- AARP
- American Red Cross
- Assisted Living Facilities
- CNA or Home Health Aide Training Schools/Programs
- Current/Past Clients and Their Families
- **Current/Past employees**
- Employment Agencies
- **Franchisor**
- Home Health Agencies (Medicare Certified)
- Hospice Agencies
- Hospitals
- Independent Living Facilities
- **Other Franchise Offices**
- **Recruitment Agency**
- **Referral from Friends**
- Schools of Nursing
- Senior Centers
- Skilled Nursing Facilities
- State Home Care Association
- **Word of Mouth (Reputation)**



RECRUITMENT SOURCES

3.3 Top Caregiver Recruitment Sources for 2020 - Median Caregiver Turnover



RECRUITMENT SOURCES

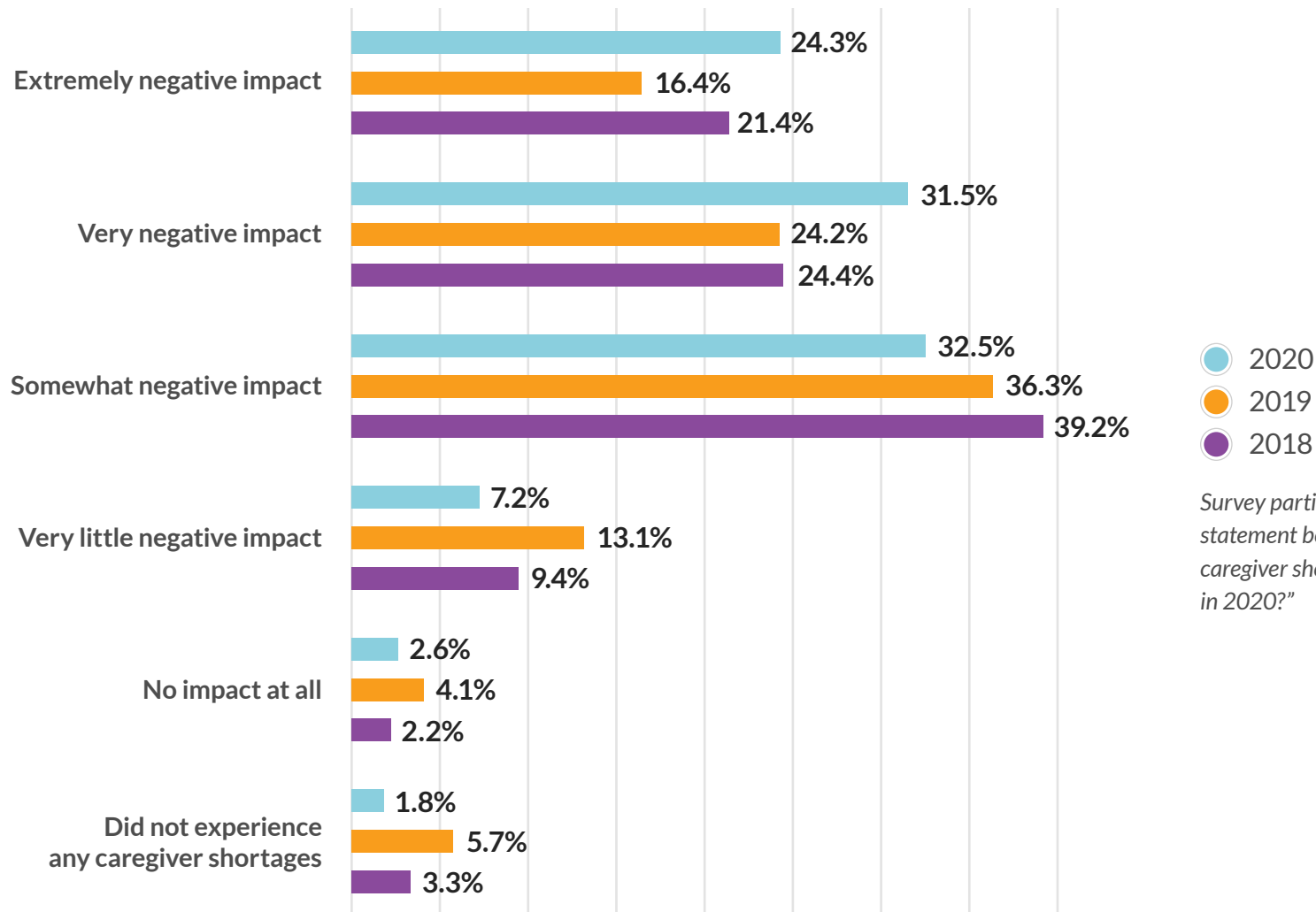
3.4 Top Caregiver Recruitment Sources for 2020 - Median Caregiver Acquisition Cost





CAREGIVER SHORTAGES

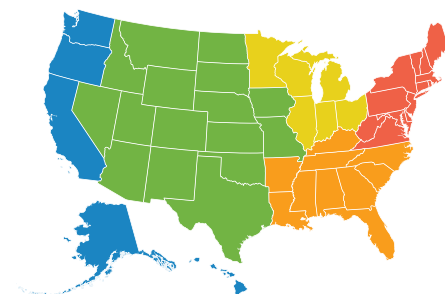
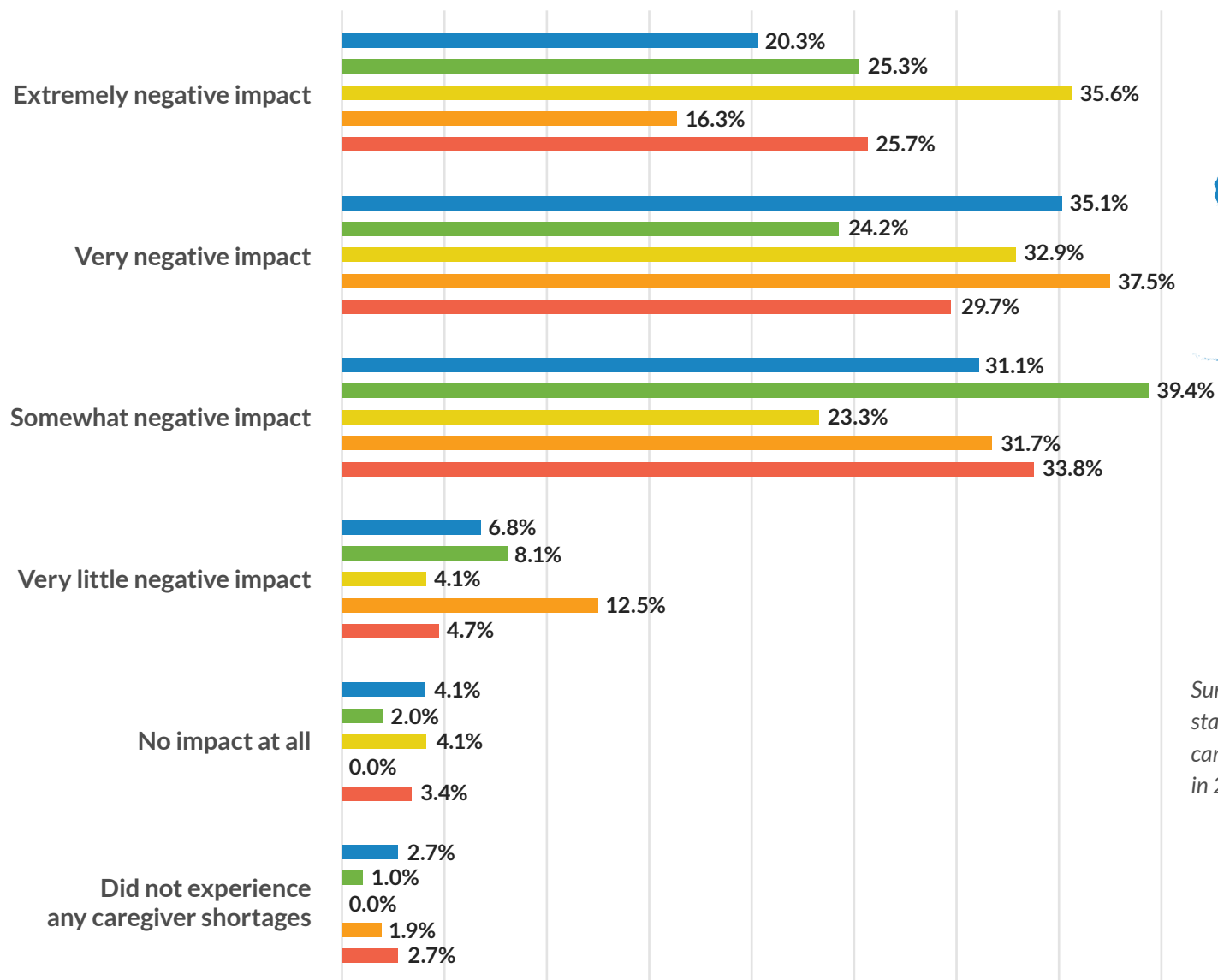
3.5 Historical Impact of Caregiver Shortages





CAREGIVER SHORTAGES

3.6 Impact of Caregiver Shortages for 2020 - Geographic Regions



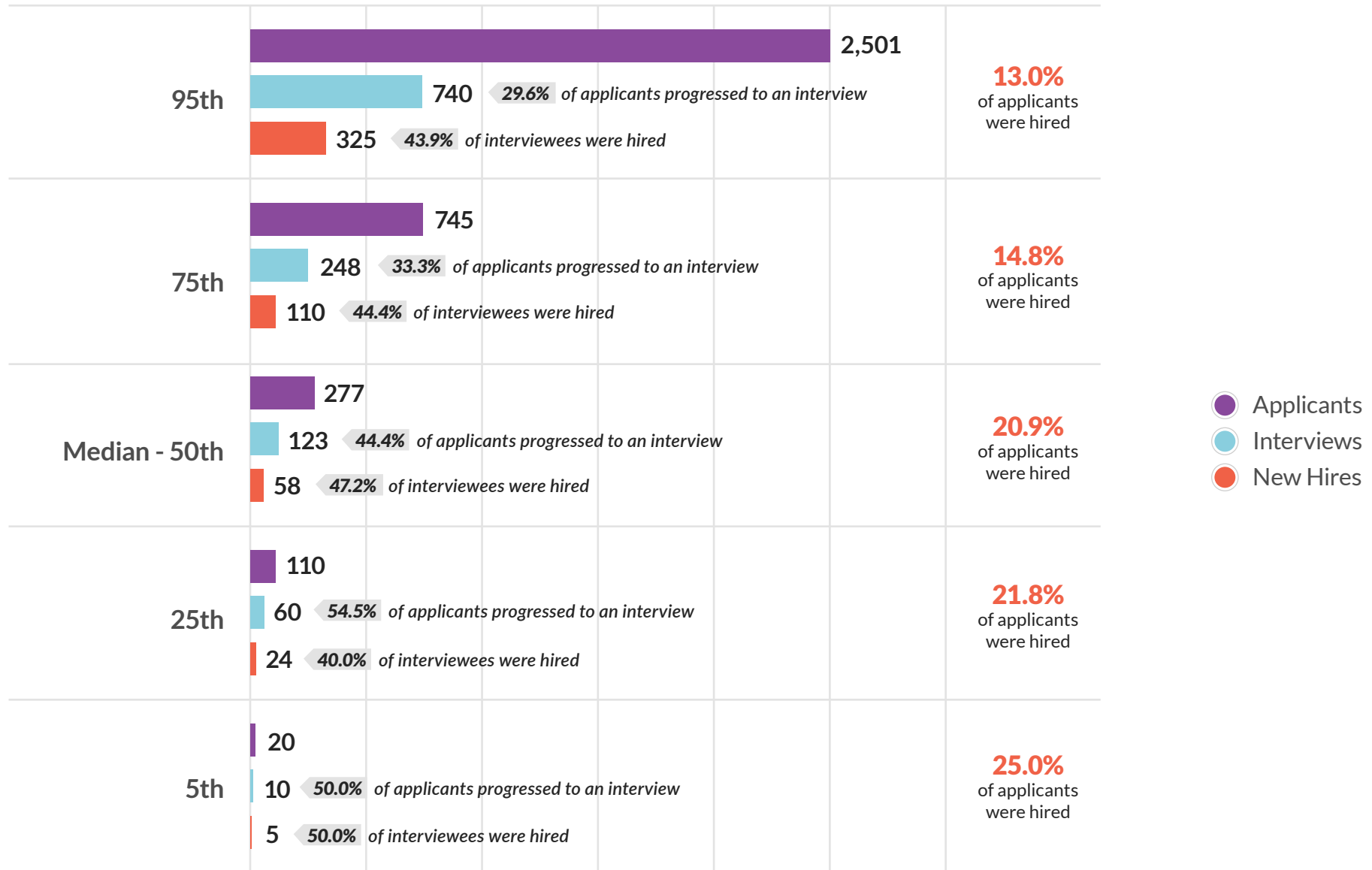
- Pacific
- Central
- Great Lakes
- Southern
- Northeast

Survey participants were asked, "Which statement best describes the impact caregiver shortages had on your business in 2020?"



CAREGIVER HIRING RATIOS

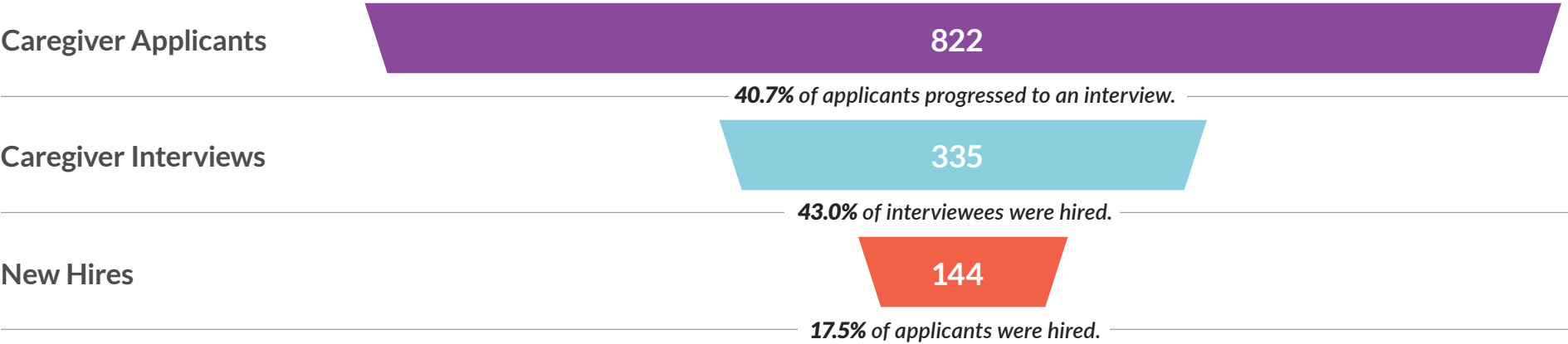
3.7 Median Caregiver Hiring Conversions for 2020 - Percentile Ranking





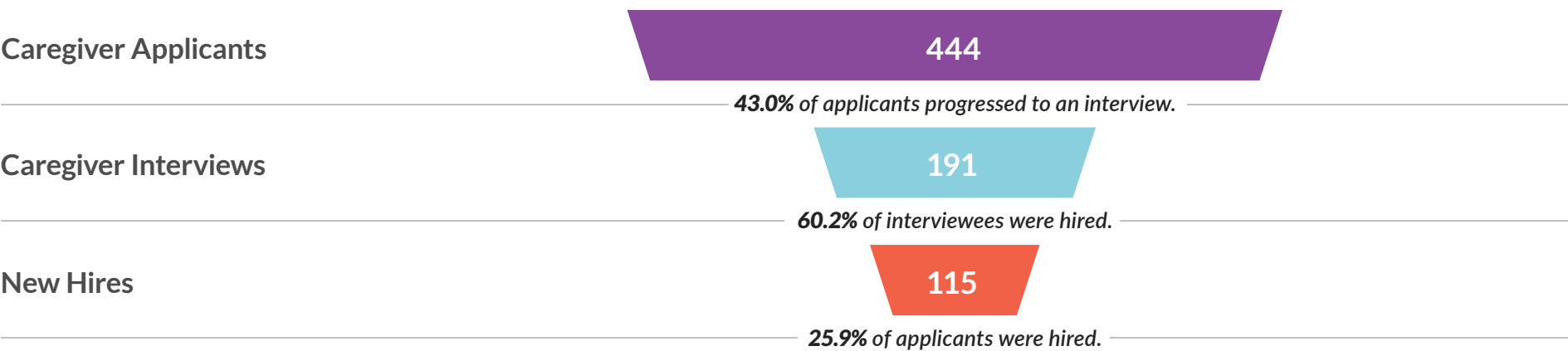
CAREGIVER HIRING RATIOS

3.8 Median Hiring Conversions for 2020 - Masters (\$5M+)



CAREGIVER HIRING RATIOS

3.9 Median Hiring Conversions for 2020 - Revenue Range (\$2.8M - \$4.99M)





CAREGIVER HIRING RATIOS

3.10 Median Hiring Conversions for 2020 - Revenue Range (\$1.6M - \$2.799M)

Caregiver Applicants

398

37.7% of applicants progressed to an interview.

Caregiver Interviews

150

50.0% of interviewees were hired.

New Hires

75

18.8% of applicants were hired.

CAREGIVER HIRING RATIOS

3.11 Median Hiring Conversions for 2020 - Revenue Range (\$800K - \$1.599M)

Caregiver Applicants

259

32.2% of applicants progressed to an interview.

Caregiver Interviews

84

54.5% of interviewees were hired.

New Hires

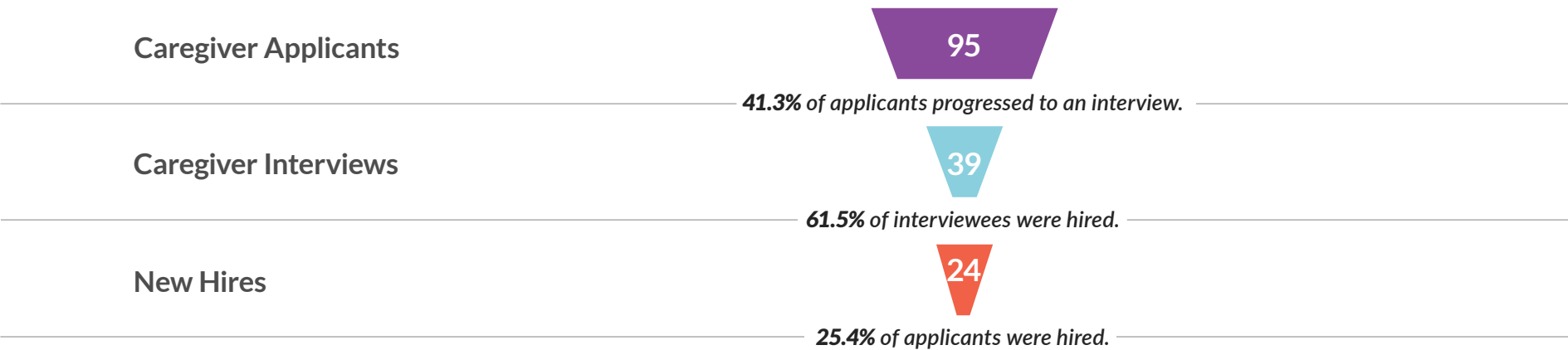
46

17.6% of applicants were hired.



CAREGIVER HIRING RATIOS

3.12 Median Hiring Conversions for 2020 - Revenue Range (\$0 - \$799K)

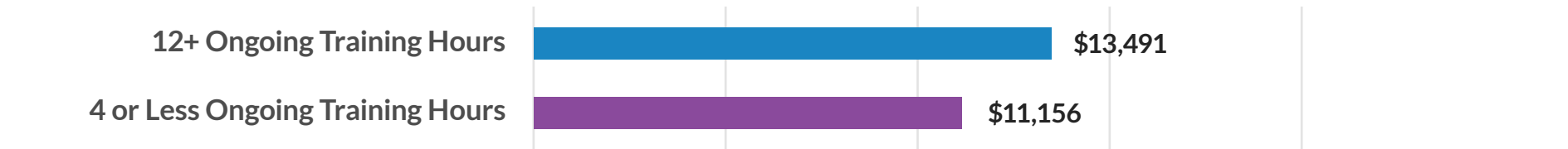


CAREGIVER LIFETIME VALUE

3.13 Median Revenue Per Caregiver Employee by Orientation Training Hours for 2020



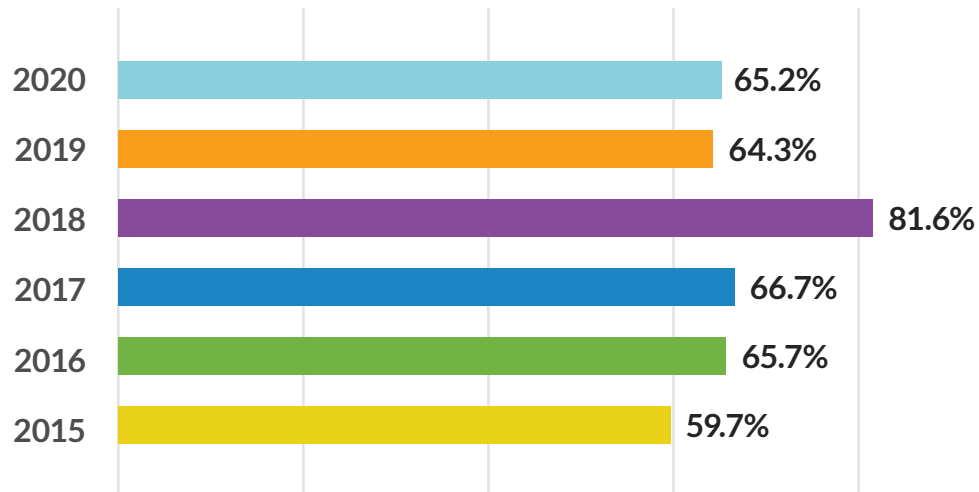
3.14 Median Revenue Per Caregiver Employee by Ongoing Training Hours for 2020





CAREGIVER TURNOVER RATES

3.15 Historical Median Caregiver Turnover Rate



Caregiver Turnover Calculation

Caregiver turnover represents the percent of caregivers who quit or were terminated in 2020. Providers had to have been in business for at least one full year. Basic caregiver turnover is calculated by taking the **number of caregivers who quit or were terminated** in the year and dividing that number by the **average number of caregivers employed** in the same time period.

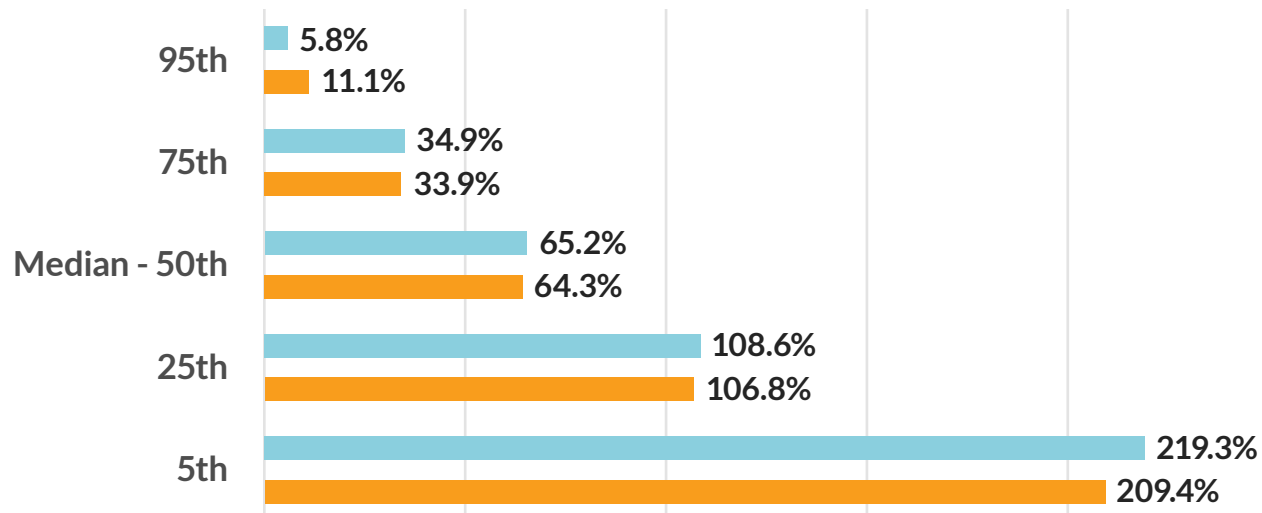
$$\frac{\text{\# of Caregivers Quit/Terminated}}{\text{Avg. \# of Caregivers Employed*}} = \text{Caregiver Turnover Rate}$$

*To calculate your average number of caregivers employed during a year, take the sum of the number of caregivers employed at the end of one year (e.g. Dec. 2019) and at the end of the next year (e.g. Dec. 2020) and divide that number by 2.

$\# \text{ of caregivers employed (Dec. 2019)} + \# \text{ of caregivers employed (Dec. 2020)} \div 2$
= Avg. # of Caregivers Employed

CAREGIVER TURNOVER RATES

3.16 Historical Caregiver Turnover Rate - Percentile Ranking



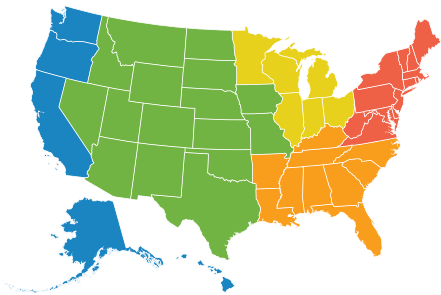
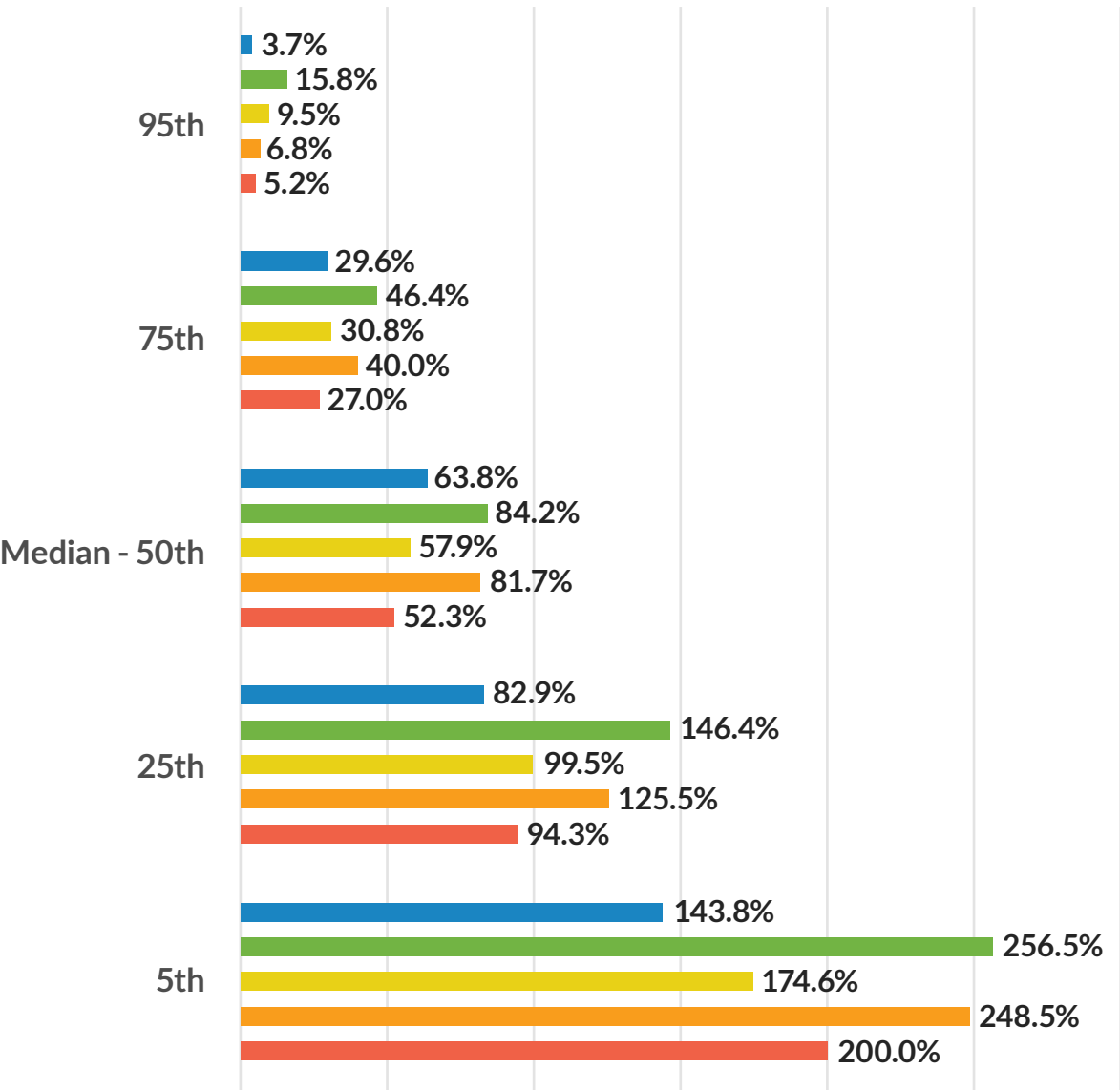
● 2020
● 2019

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value on the right, fall somewhere in the 75th percentile, you are outperforming 75% of the industry in that particular measurement.



CAREGIVER TURNOVER RATES

3.17 Caregiver Turnover Rate by Percentile Ranking for 2020 - Geographic Region



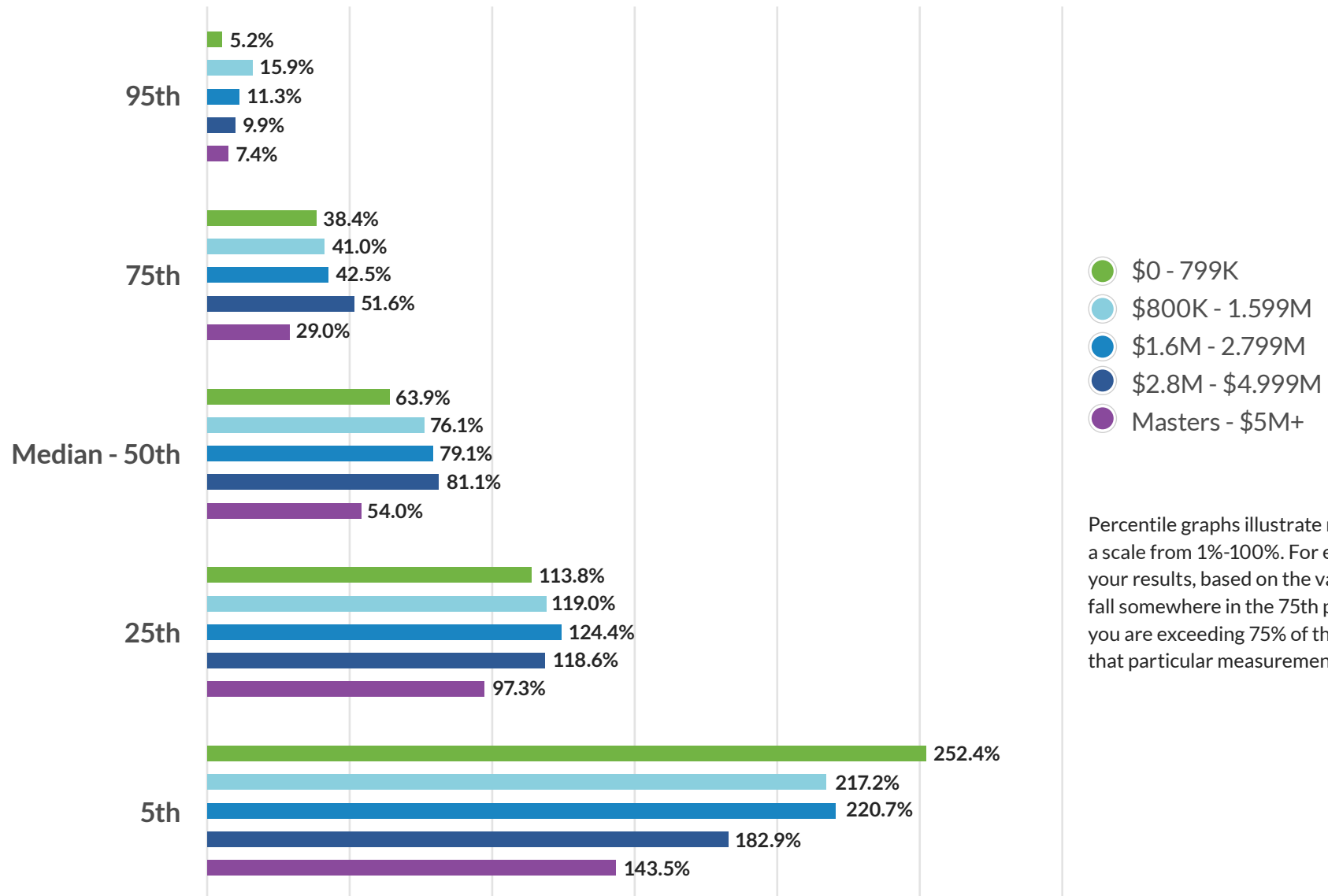
- Pacific
- Central
- Great Lakes
- Southern
- Northeast

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



CAREGIVER TURNOVER RATES

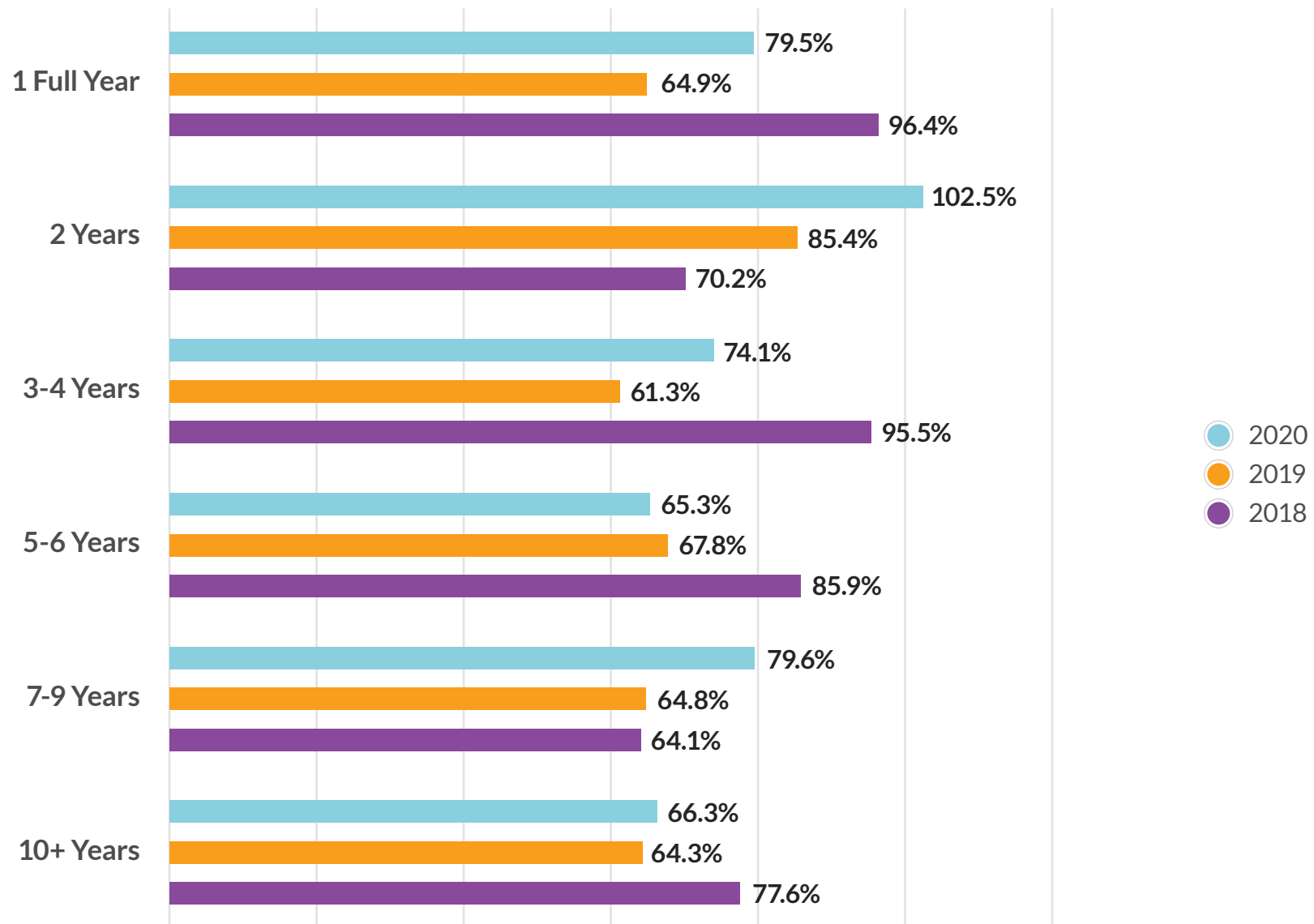
3.18 Caregiver Turnover Rate for 2020 - Revenue Range





CAREGIVER TURNOVER RATES

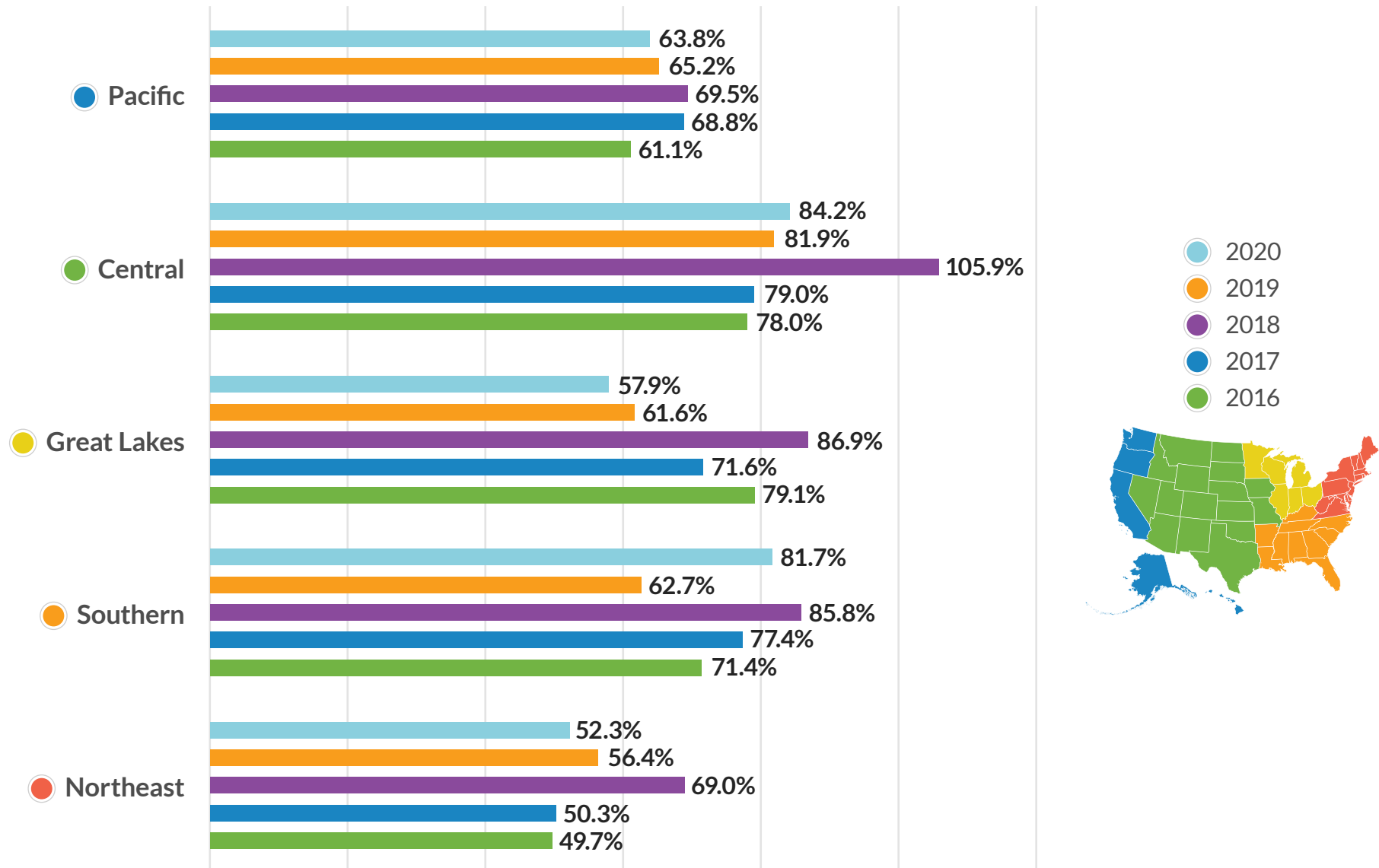
3.19 Historical Median Caregiver Turnover Rate - Years in Business





CAREGIVER TURNOVER RATES

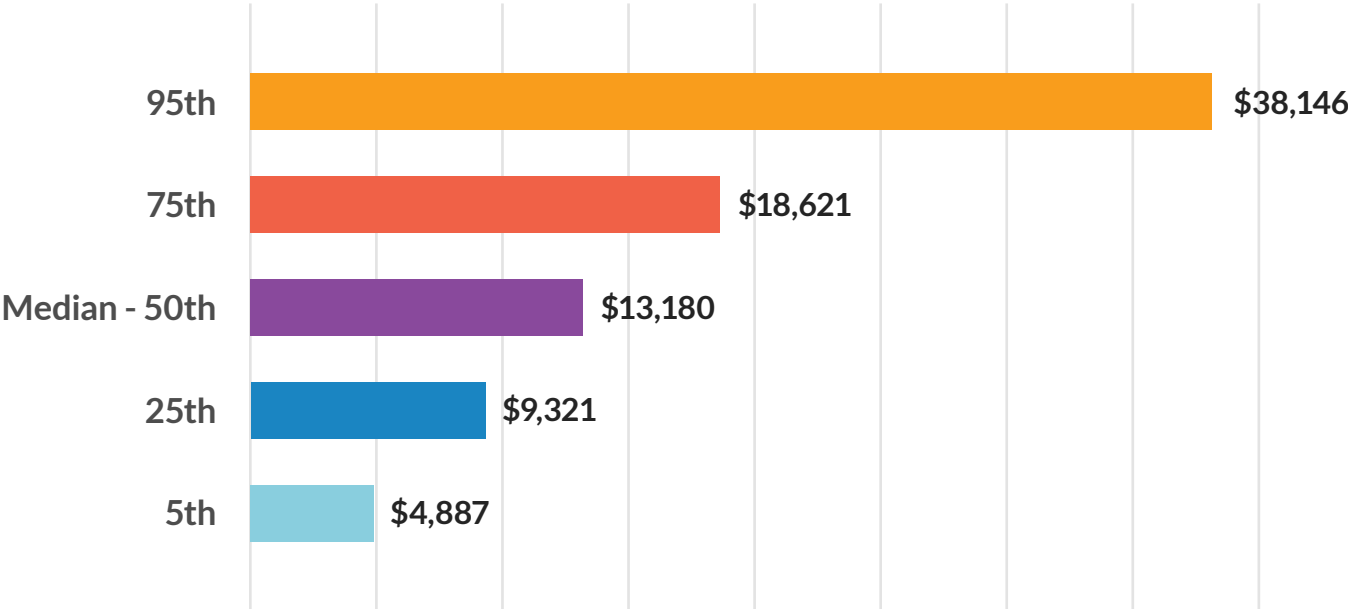
3.20 Historical Median Caregiver Turnover Rate - Geographic Region





REVENUE PER CAREGIVER EMPLOYEE

3.21 Revenue Per Caregiver Employee for 2020 - Percentile Ranking



Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

Note: In past editions, this data point has been titled 'Lifetime Value of a Caregiver.' The title has been updated to more clearly reflect exactly which information is being conveyed and avoid suggesting that the value of a caregiver is contained only in the direct revenue they bring in.

Revenue Per Caregiver Employee Calculation

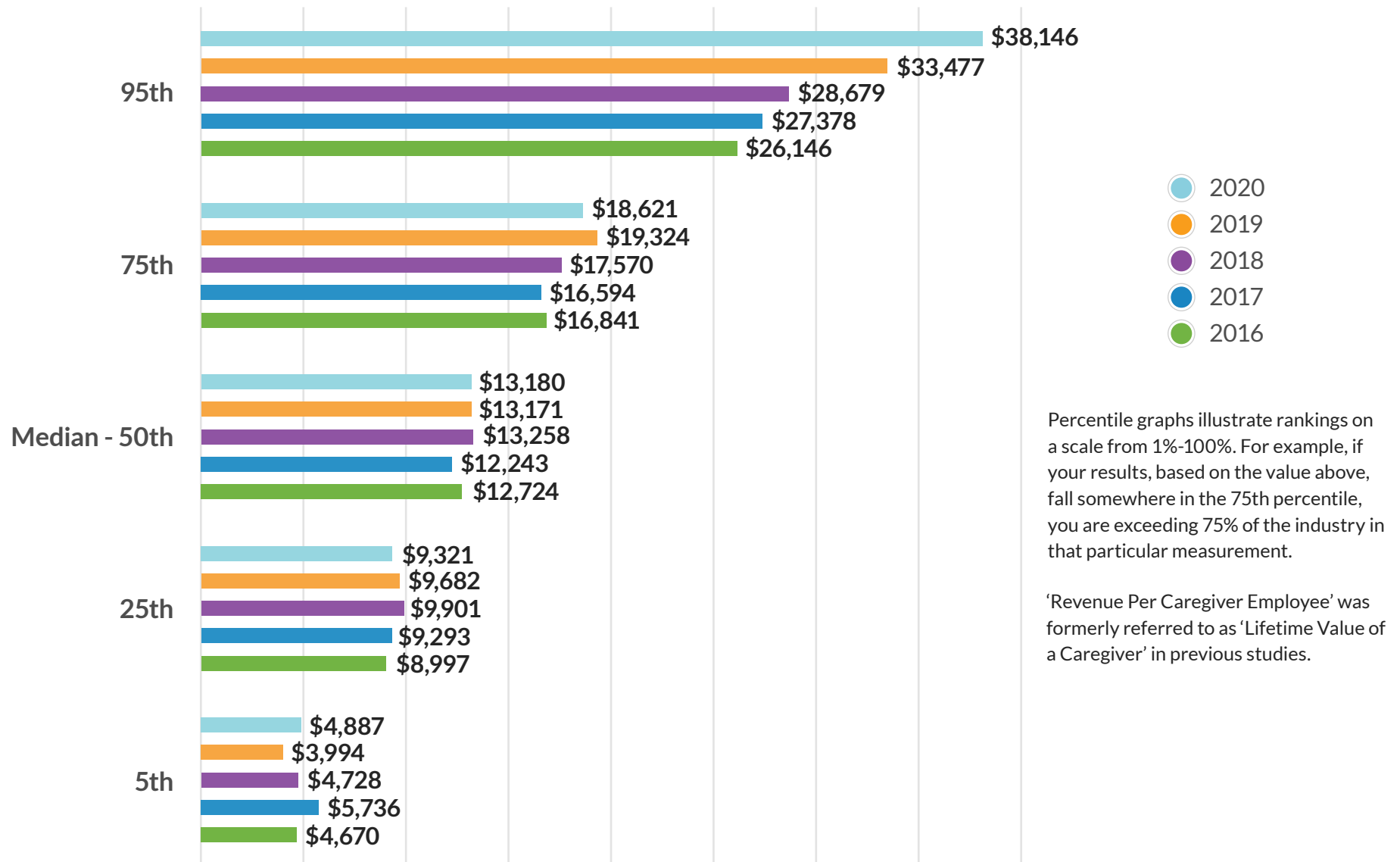
To calculate the Revenue Per Caregiver Employee, divide your **annual revenue** by the **number of caregivers employed** in the same year. Then multiply this number by the **average length of employment** for your caregivers.





REVENUE PER CAREGIVER EMPLOYEE

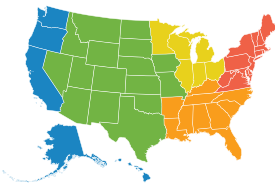
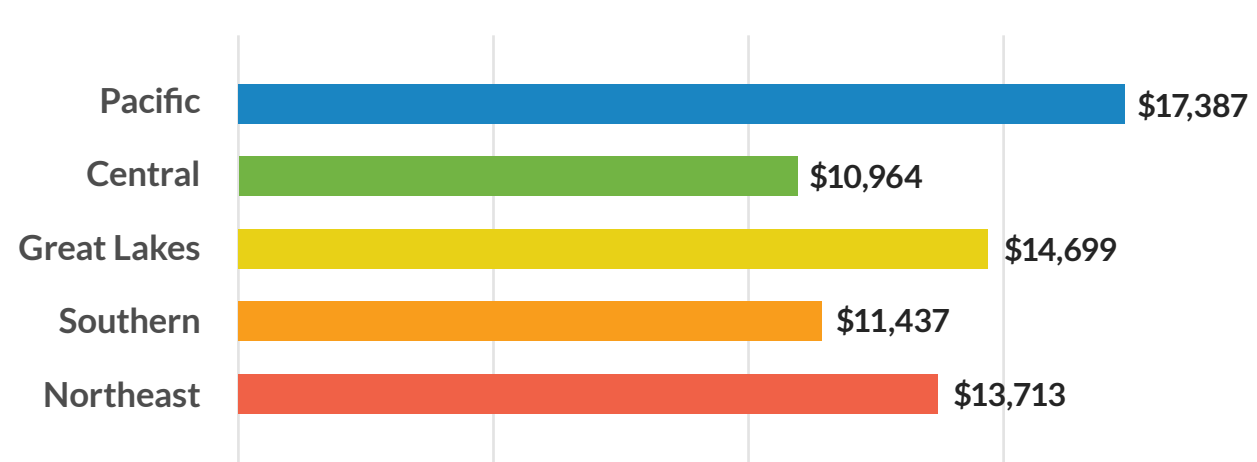
3.22 Historical Revenue Per Caregiver Employee - Percentile Ranking





REVENUE PER CAREGIVER EMPLOYEE

3.23 Median Revenue Per Caregiver Employee for 2020 - Geographic Region

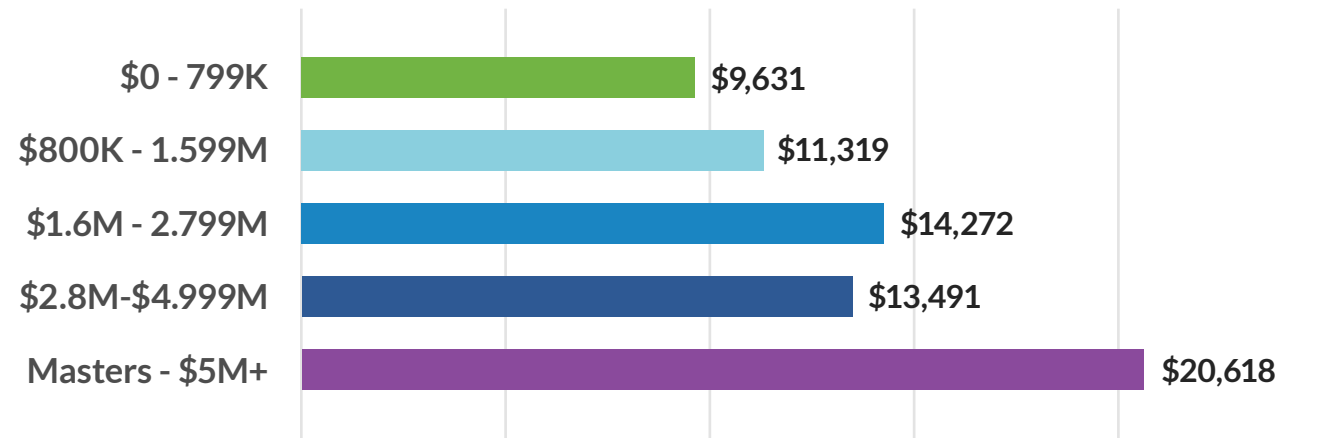


To calculate the Revenue Per Caregiver Employee, divide your **annual revenue** by the **number of caregivers employed** in the same year. Then multiply this number by the **average length of employment** for your caregivers.

'Revenue Per Caregiver Employee' was formerly referred to as 'Lifetime Value of a Caregiver' in previous studies.

REVENUE PER CAREGIVER EMPLOYEE

3.24 Median Revenue Per Caregiver Employee for 2020 - Revenue Ranges



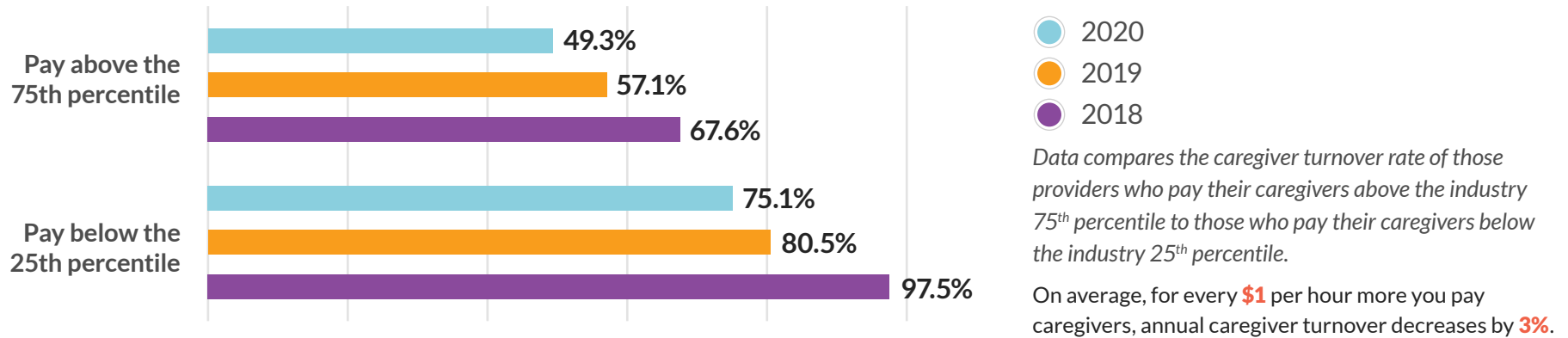
To calculate the Revenue Per Caregiver Employee, divide your **annual revenue** by the **number of caregivers employed** in the same year. Then multiply this number by the **average length of employment** for your caregivers.

'Revenue Per Caregiver Employee' was formerly referred to as 'Lifetime Value of a Caregiver' in previous studies.



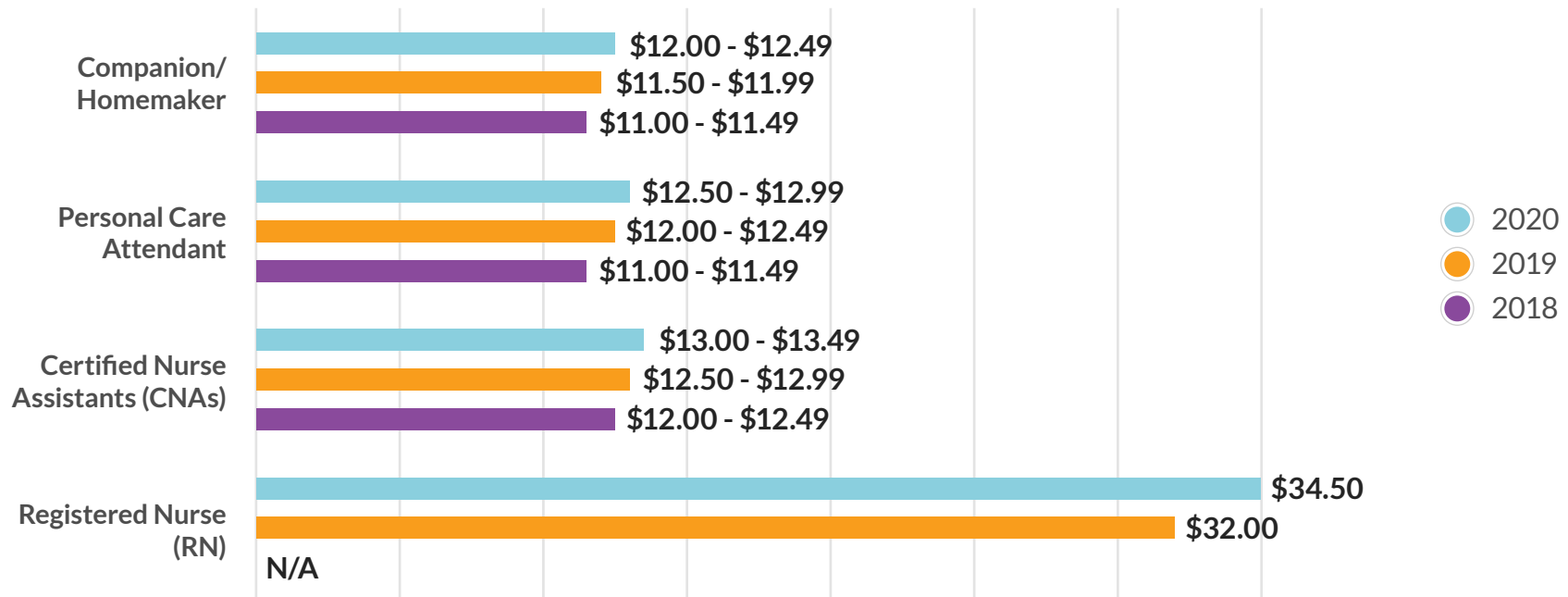
CAREGIVER PAY RANGES

3.25 Historical Median Caregiver Turnover - Caregiver Wages Comparison



CAREGIVER PAY RANGES

3.26 Historical Median Hourly Caregiver Pay Ranges - Overall





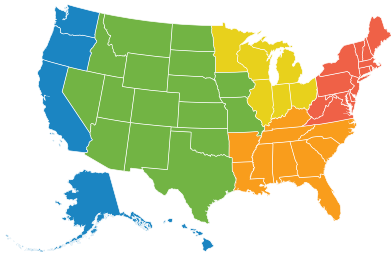
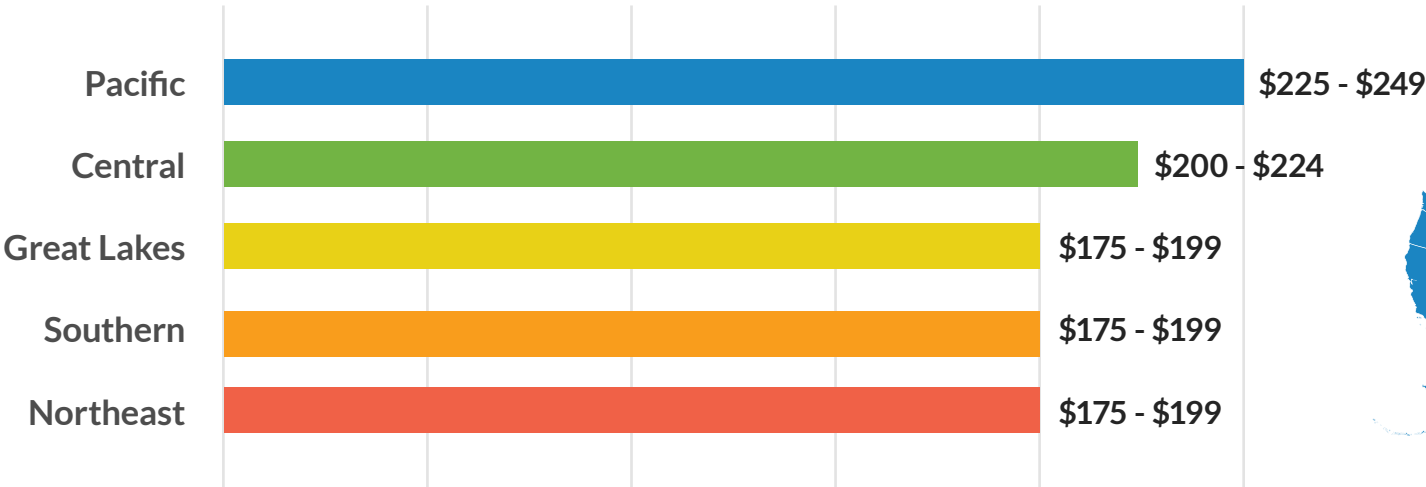
CAREGIVER PAY RANGES

3.27 Historical Live-In Caregiver Pay Ranges per 24-Hour Shift - Overall



CAREGIVER PAY RANGES

3.28 Live-In Caregiver Pay Ranges per 24 Hour Shift for 2020 - Geographic Regions

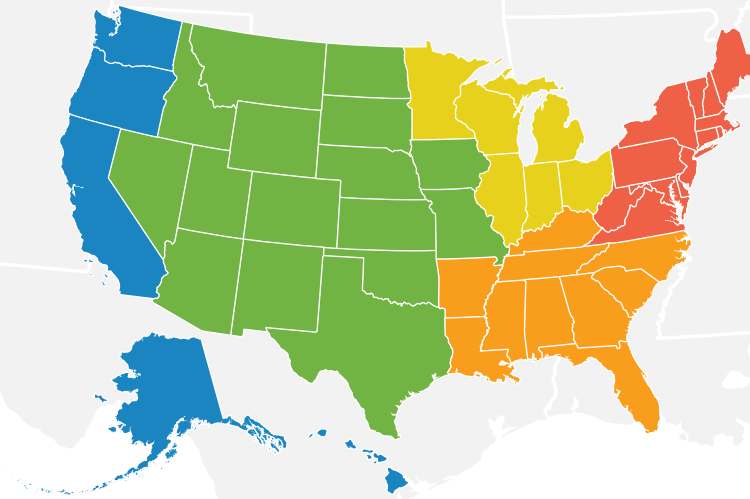




Caregiver Wages Comparison

GEOGRAPHIC REGIONS

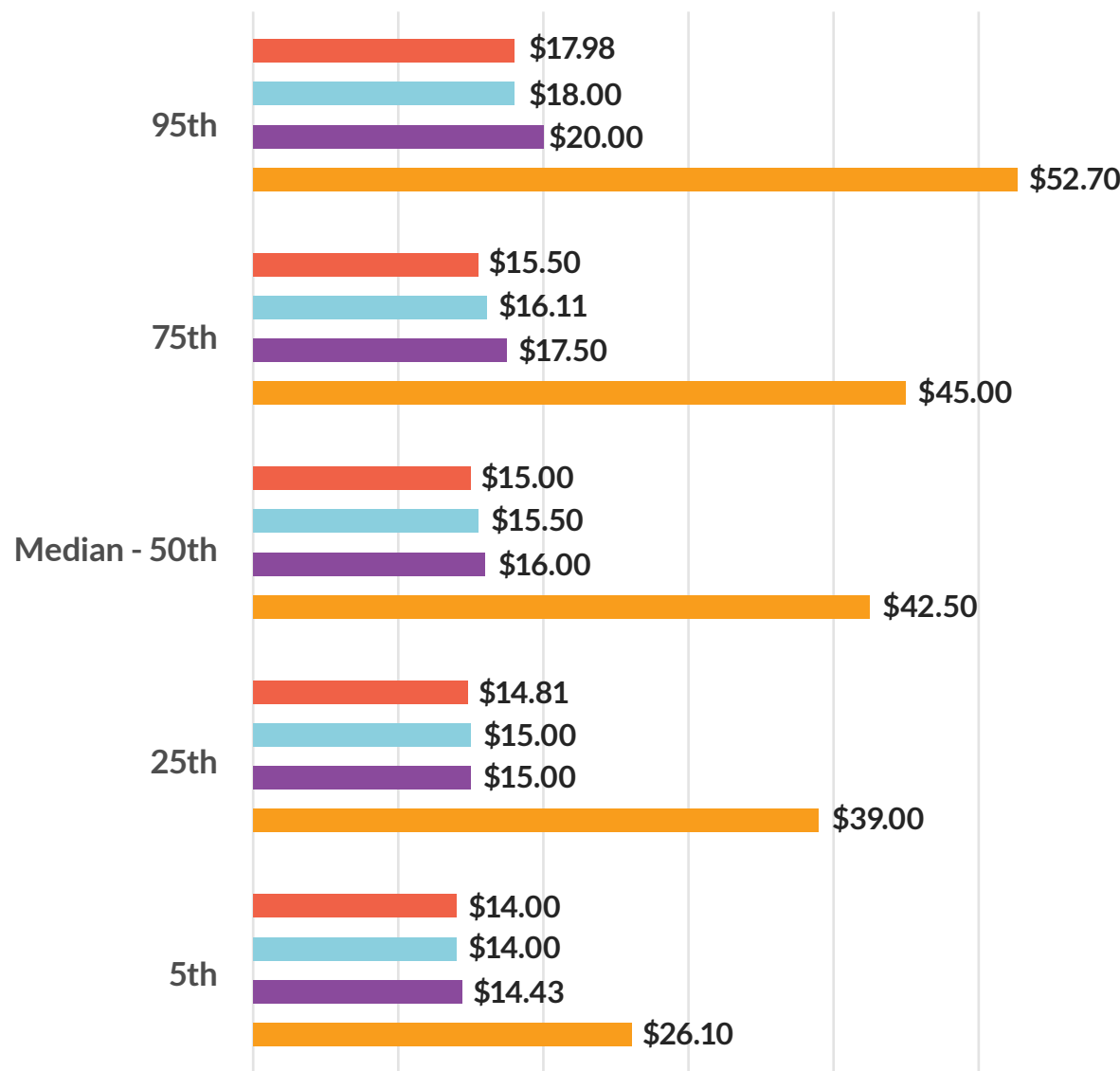
-  Pacific
-  Central
-  Great Lakes
-  Southern
-  Northeast





CAREGIVER WAGES COMPARISON

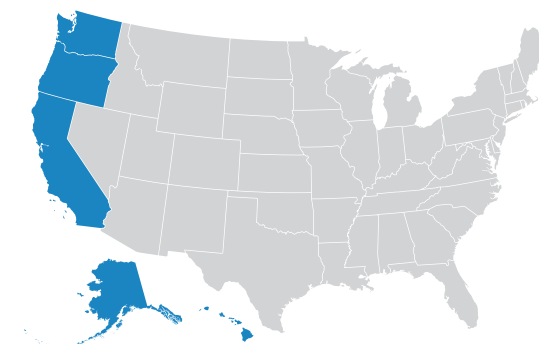
3.29 Caregiver Wages by Geographical Region for 2020 - Pacific



- Companion/Homemaker
- Personal Care Attendant
- Certified Nurse Assistant
- Registered Nurse

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

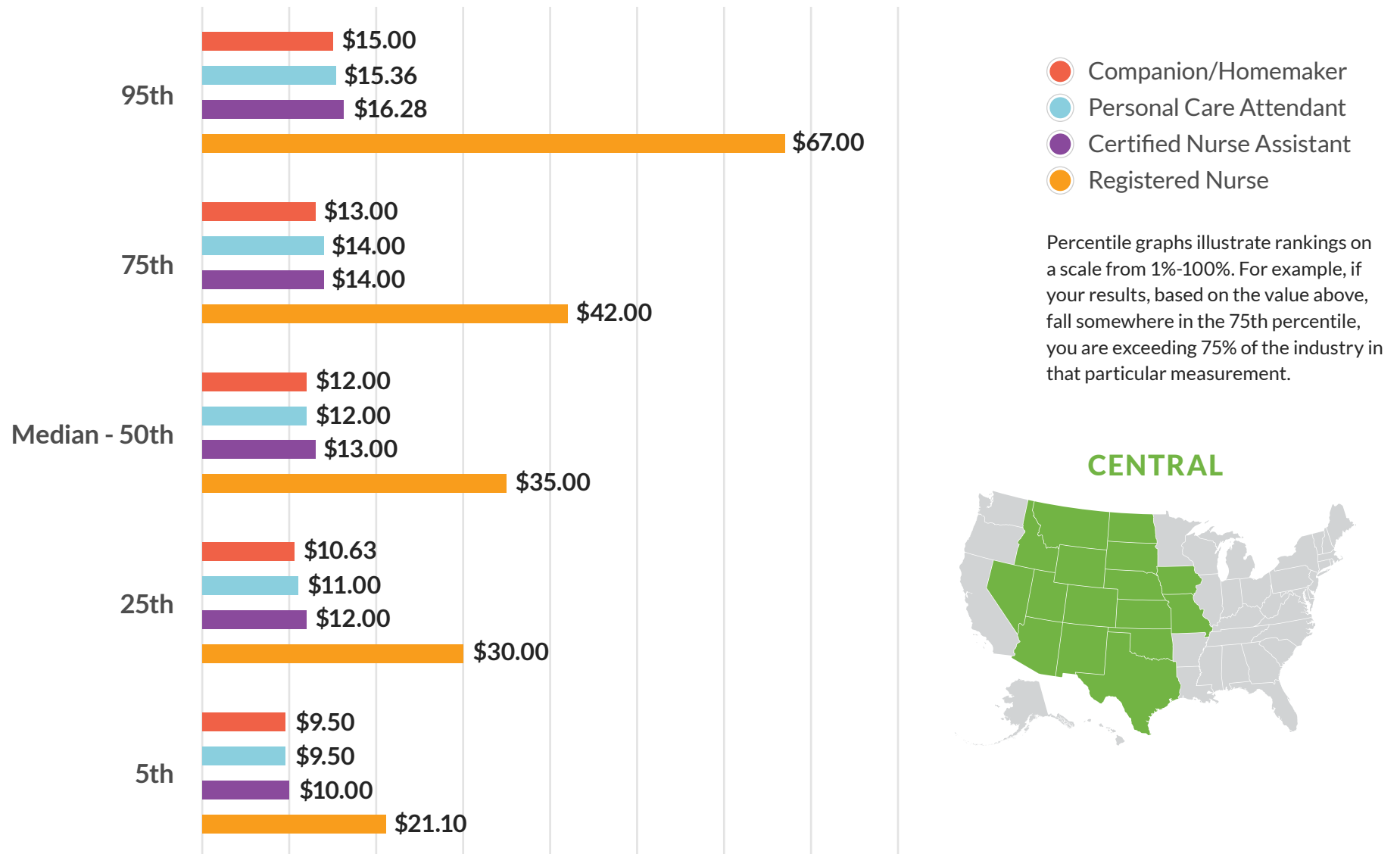
PACIFIC





CAREGIVER WAGES COMPARISON

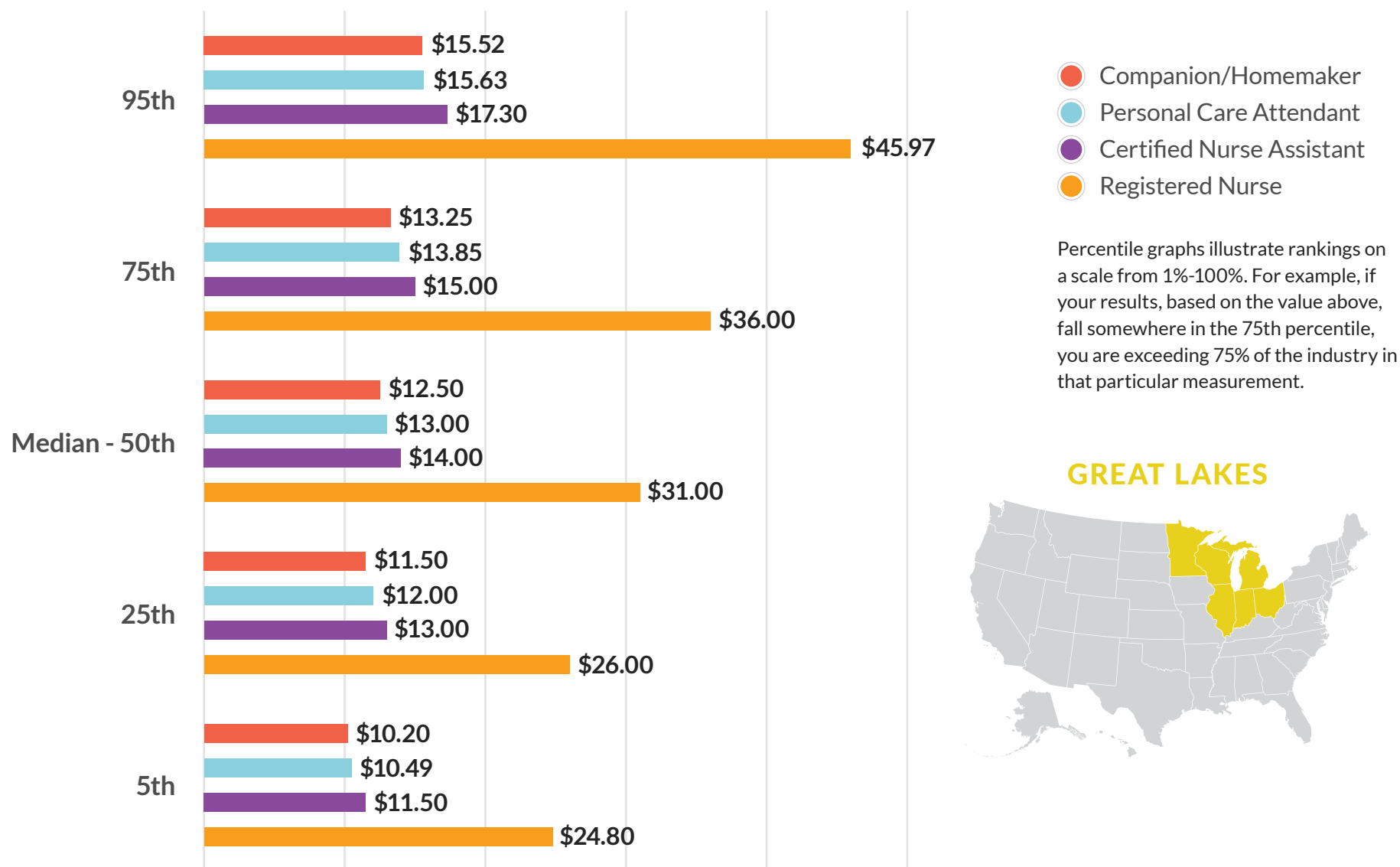
3.30 Caregiver Wages by Geographical Region for 2020 - Central





CAREGIVER WAGES COMPARISON

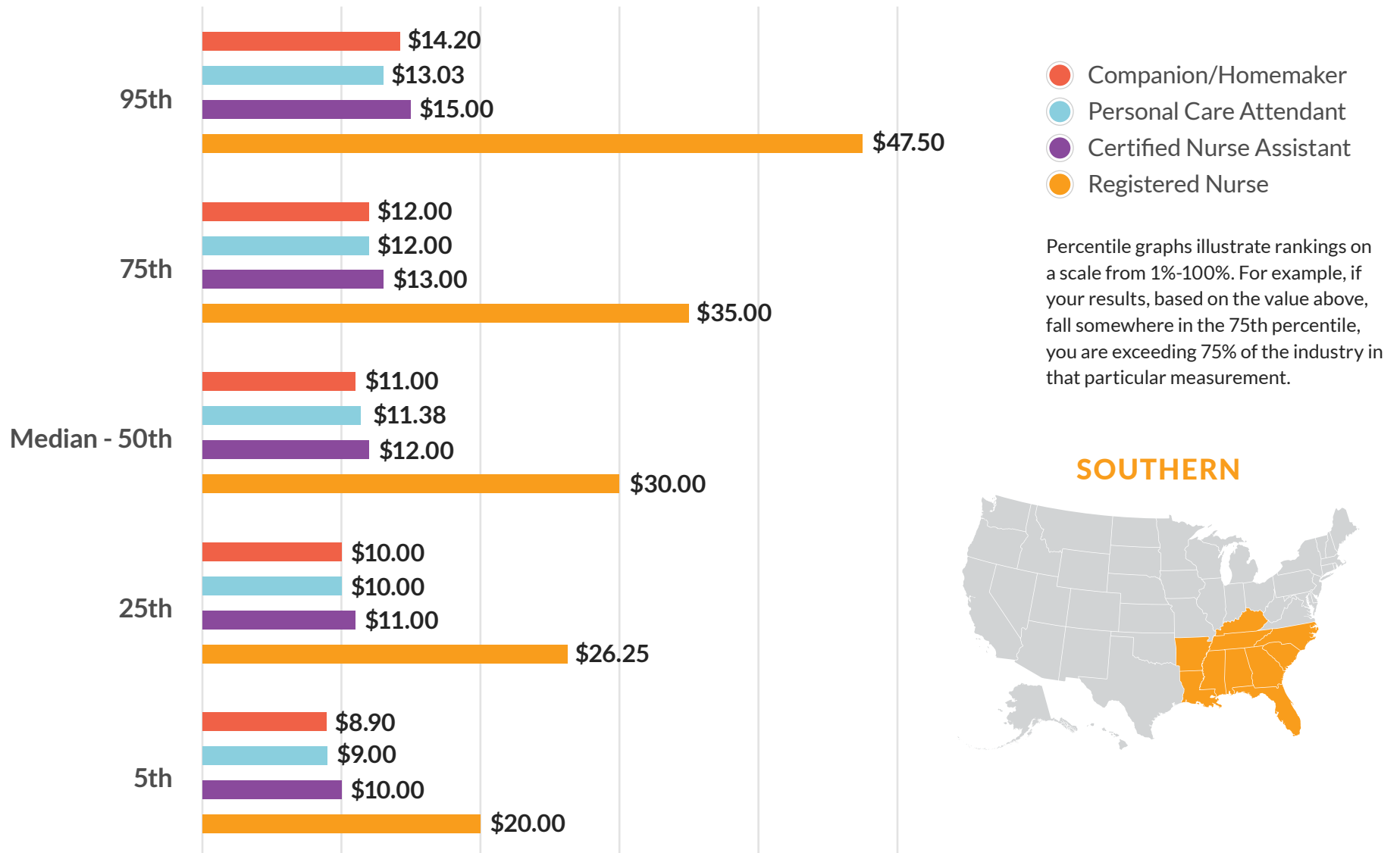
3.31 Caregiver Wages by Geographical Region for 2020 - Great Lakes





CAREGIVER WAGES COMPARISON

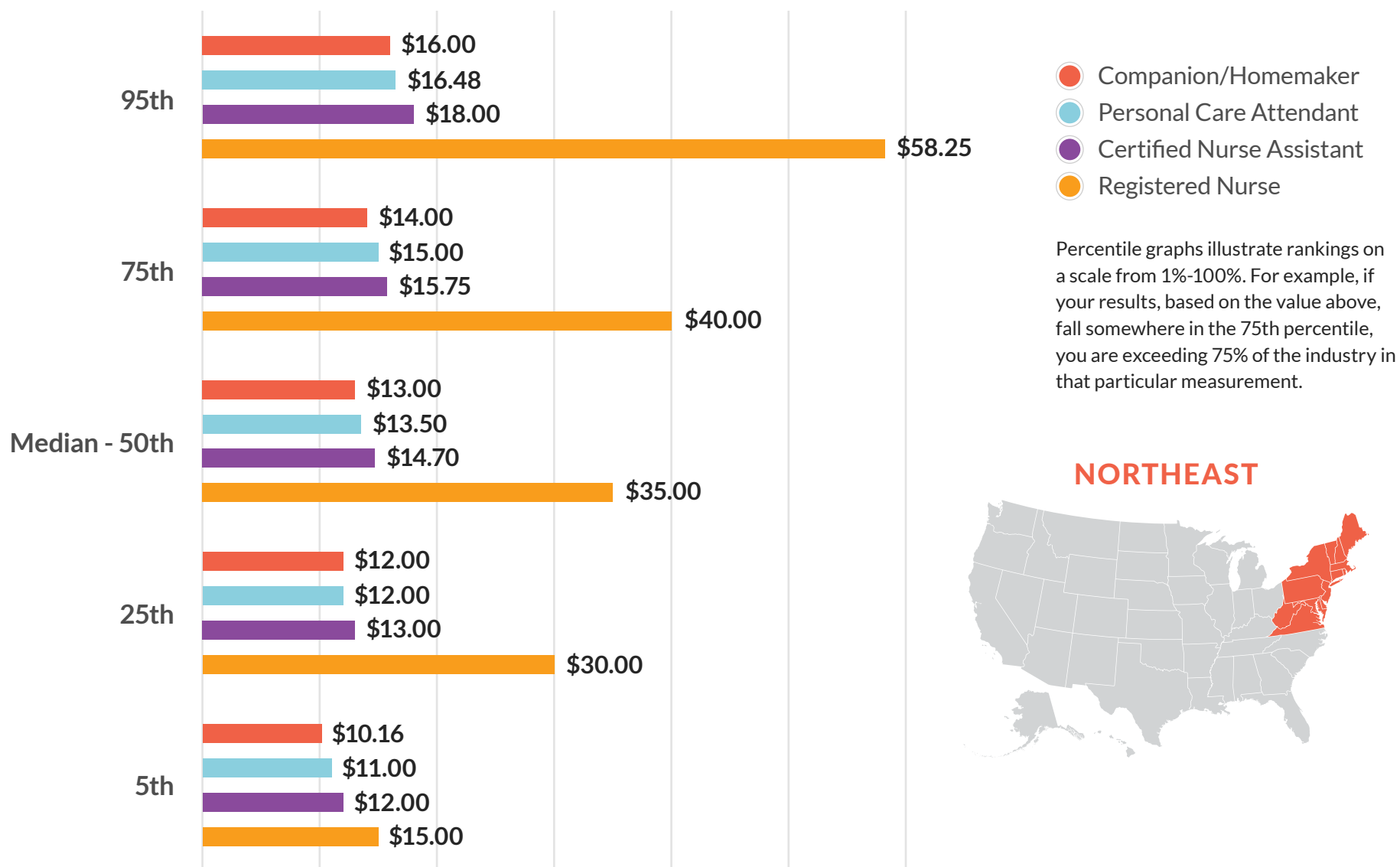
3.32 Caregiver Wages by Geographical Region for 2020 - Southern





CAREGIVER WAGES COMPARISON

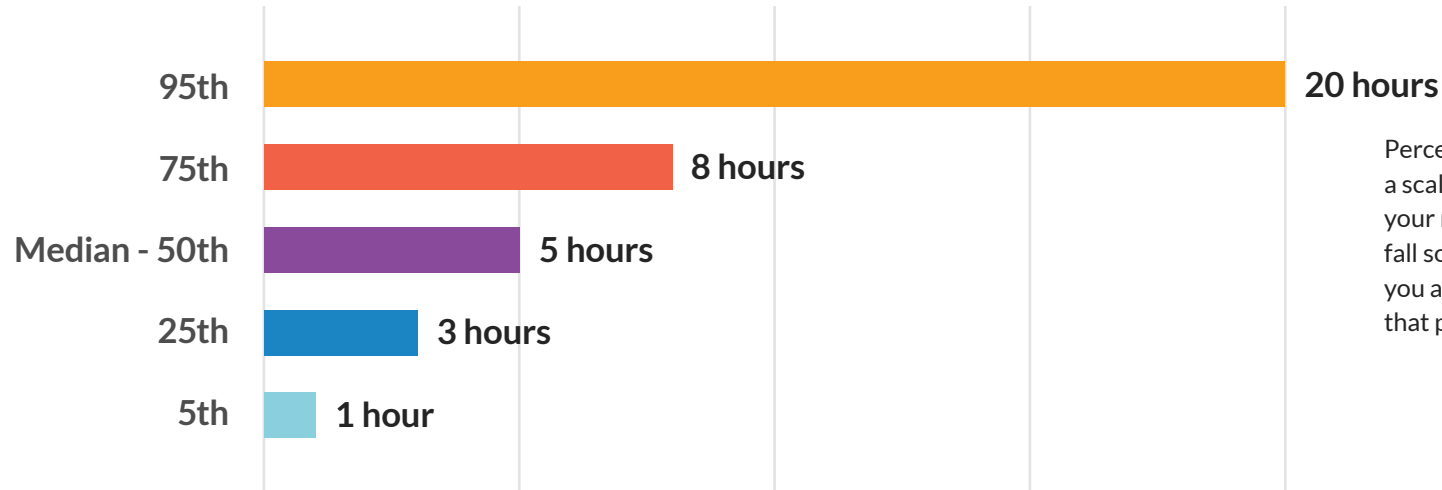
3.33 Caregiver Wages by Geographical Region for 2020 - Northeast





CAREGIVER TRAINING

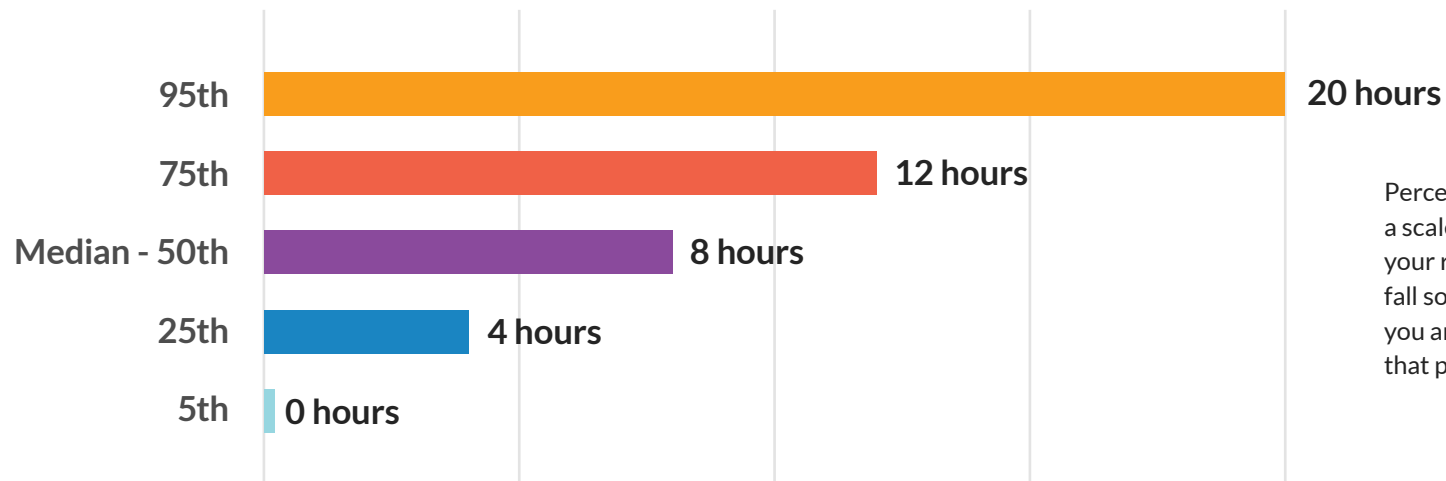
3.34 Number of Orientation Training Hours for 2020 - Percentile Ranking



Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

CAREGIVER TRAINING

3.35 Number of Ongoing Training Hours for 2020 - Percentile Ranking

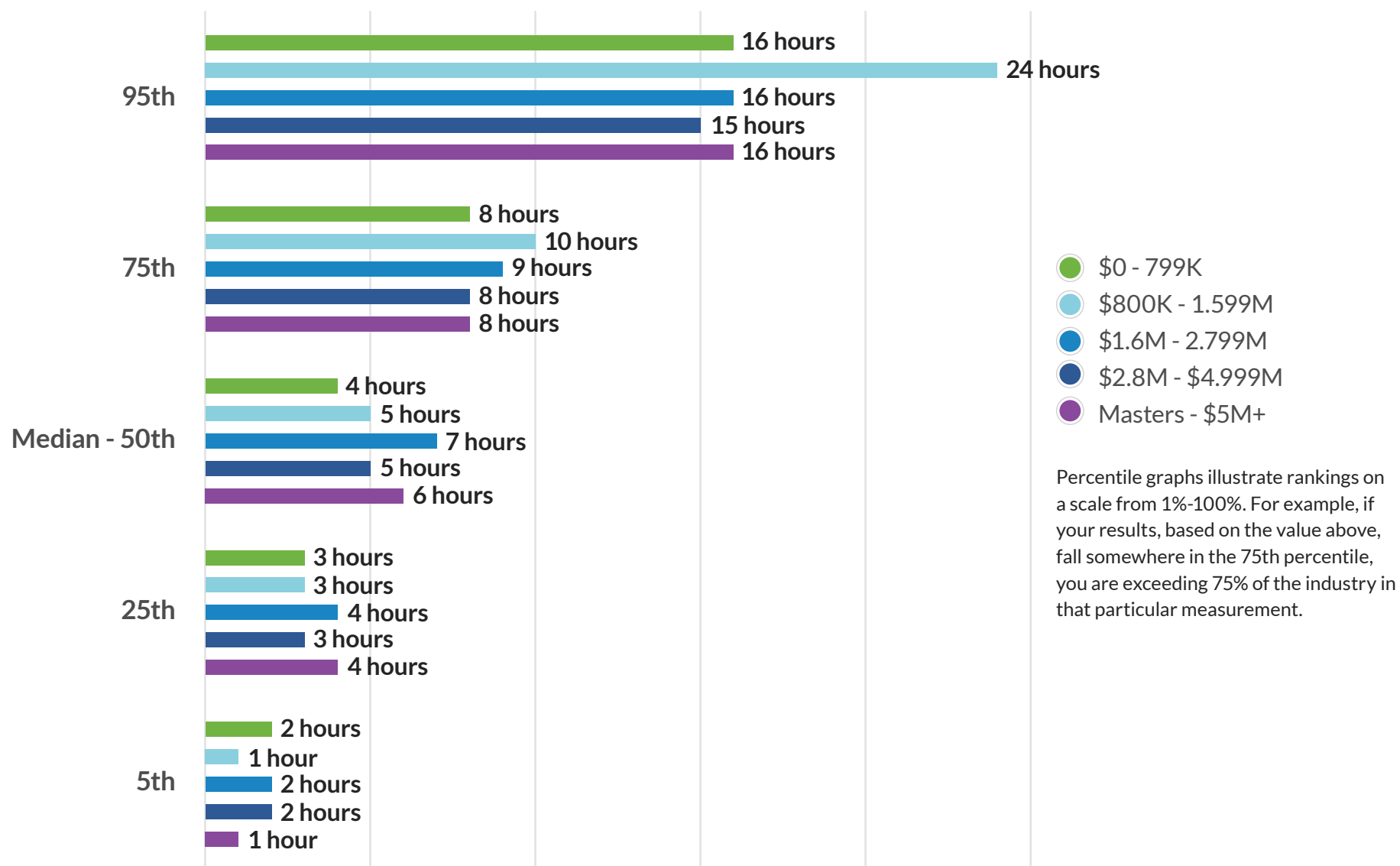


Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



CAREGIVER TRAINING

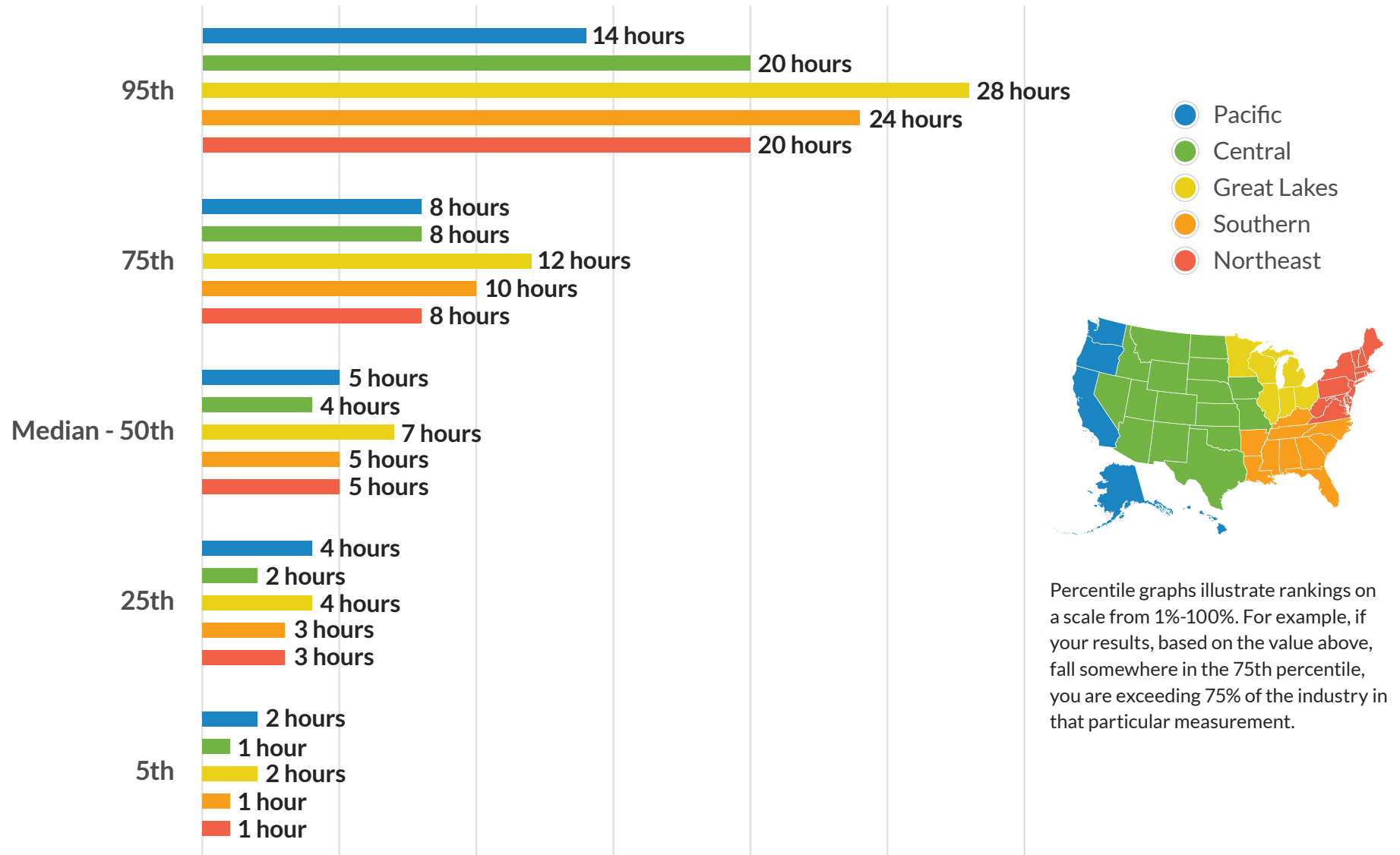
3.36 Number of Orientation Training Hours for 2020 - Revenue Range





CAREGIVER TRAINING

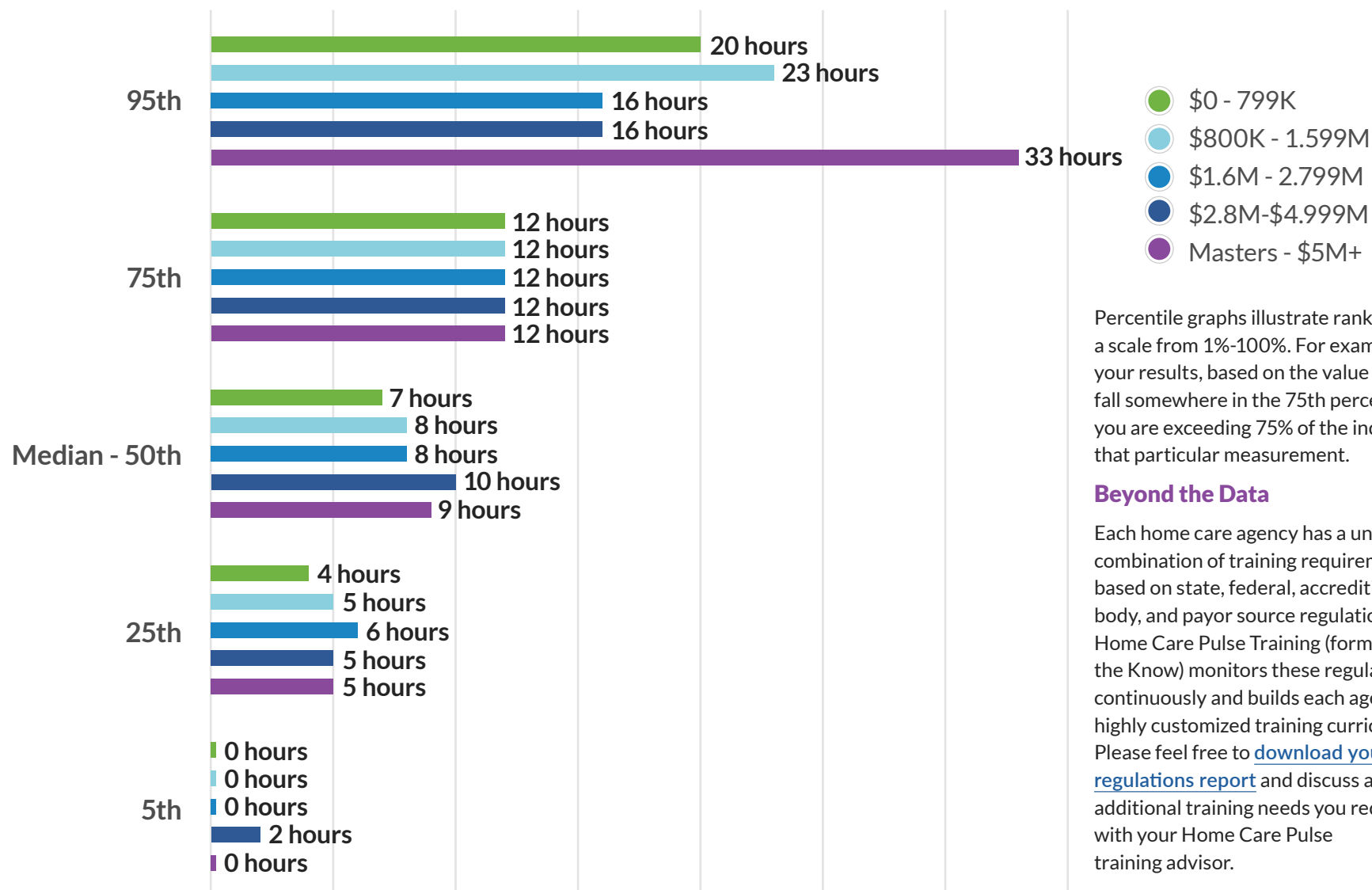
3.37 Number of Orientation Training Hours for 2020 - Geographic Regions





CAREGIVER TRAINING

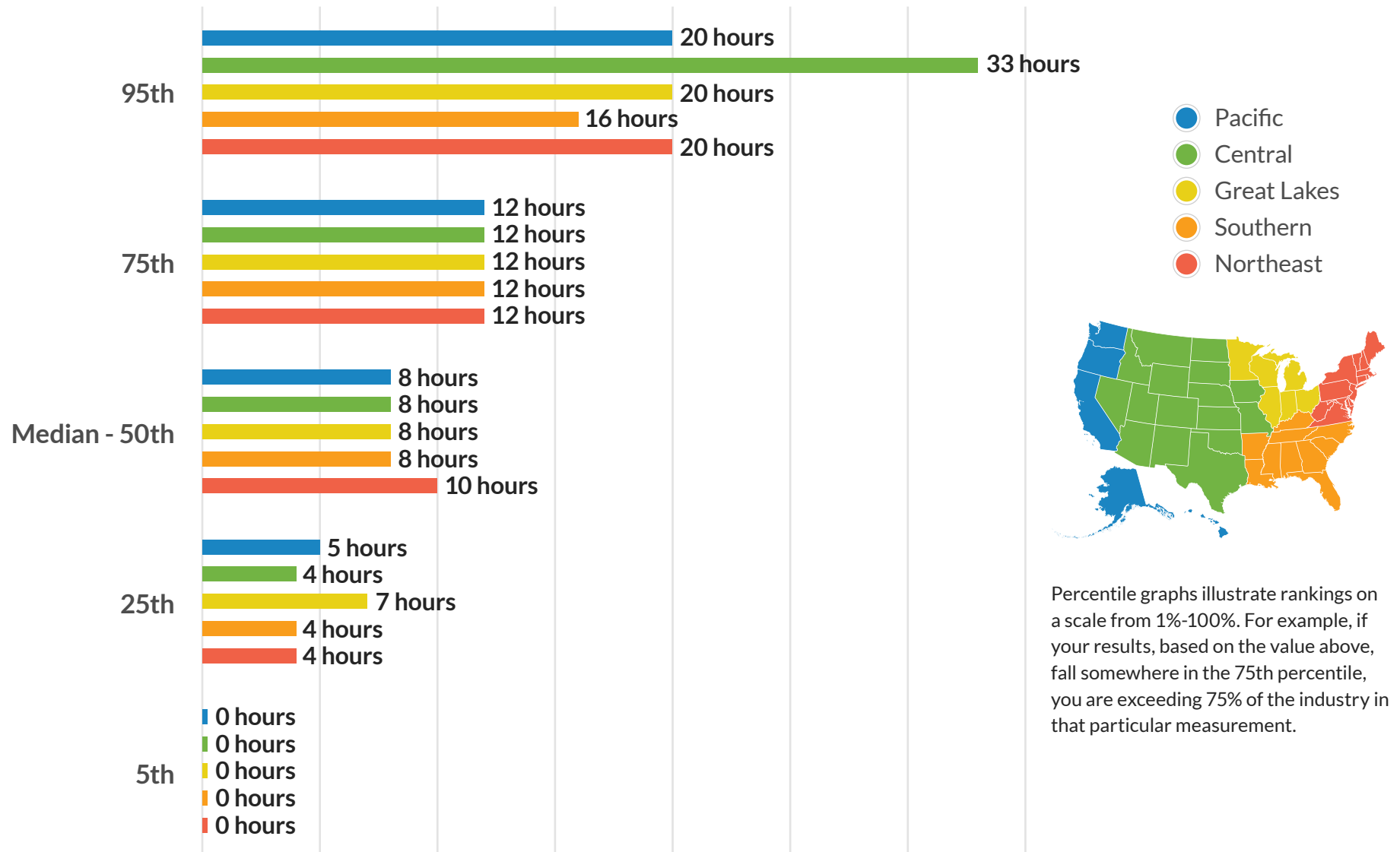
3.38 Number of Ongoing Training Hours for 2020 - Revenue Range





CAREGIVER TRAINING

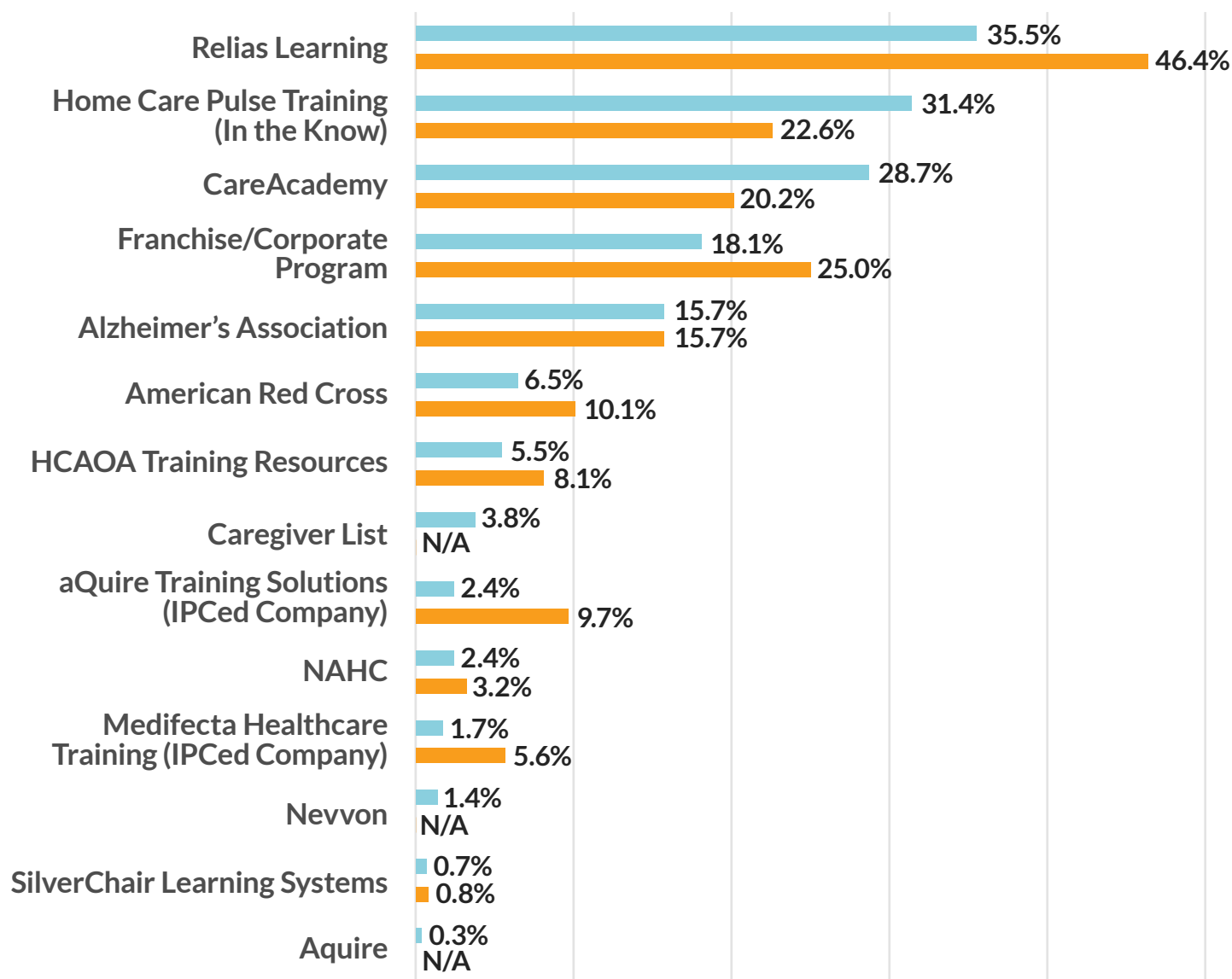
3.39 Number of Ongoing Training Hours for 2020 - Geographic Regions





CAREGIVER TRAINING

3.40 Historical Top 10 Professional Training Programs



2020

2019

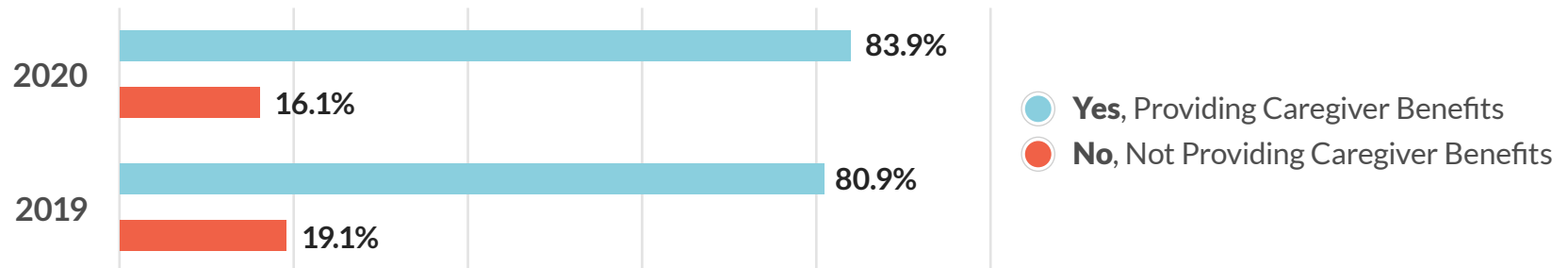
66.3% of providers use a professional training program.

For more information regarding ongoing training options for your caregivers, visit homecarepulse.com/training.



CAREGIVER BENEFITS

3.41 Historical Percentage of Agencies Providing Caregiver Benefits



CAREGIVER BENEFITS

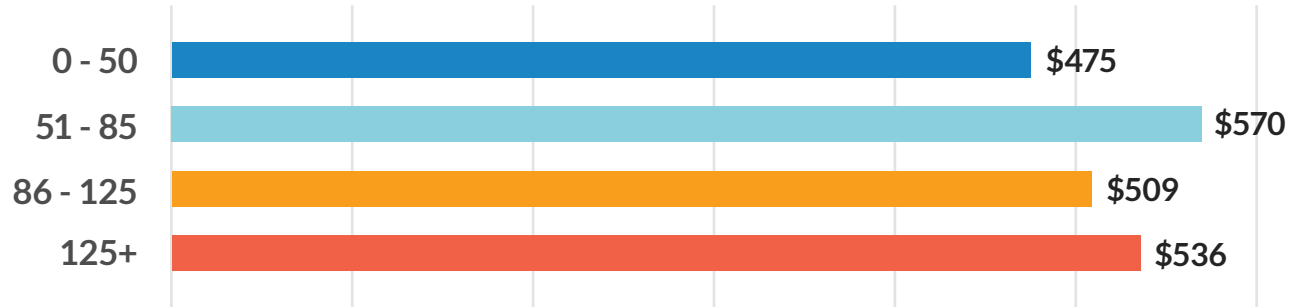
3.42 Caregiver Benefits Provided for 2020 - Overall & Revenue Ranges

Type of Benefit	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	Leaders - \$2.8M - 4.999M	Masters - \$5M+	2020 Overall
Travel Reimbursement	39.1%	66.2%	52.9%	56.5%	53.5%	52.0%
PTO	37.0%	50.0%	48.5%	59.4%	53.5%	48.7%
Major Health	13.0%	28.4%	55.9%	62.3%	74.4%	46.4%
Supplement (i.e., Aflac)	23.9%	50.0%	50.0%	44.9%	44.2%	41.1%
401K Matching	17.4%	39.2%	44.1%	53.6%	55.8%	40.1%
Dental	15.2%	32.4%	39.7%	52.2%	67.4%	39.8%
Sick Leave	30.4%	33.8%	42.6%	43.5%	55.8%	39.0%
Daily/Weekly Pay	34.8%	27.0%	33.8%	34.8%	41.9%	33.9%
Education Reimbursement	26.1%	23.0%	20.6%	21.7%	30.2%	23.2%
FSA or Cafeteria Plan	4.3%	6.8%	5.9%	10.1%	11.6%	7.1%
Profit Sharing	4.3%	5.4%	4.4%	8.7%	0.0%	5.4%
Childcare or Daycare Service for Caregivers	0.0%	2.7%	2.9%	1.4%	0.0%	1.3%
DCAP (Depend Care Assistance Program)	0.0%	0.0%	1.5%	0.0%	2.3%	1.0%



NUMBER OF CAREGIVERS EMPLOYED

3.43 Median Caregiver Acquisition Cost for 2020 - Number of Caregivers Employed



NUMBER OF CAREGIVERS EMPLOYED

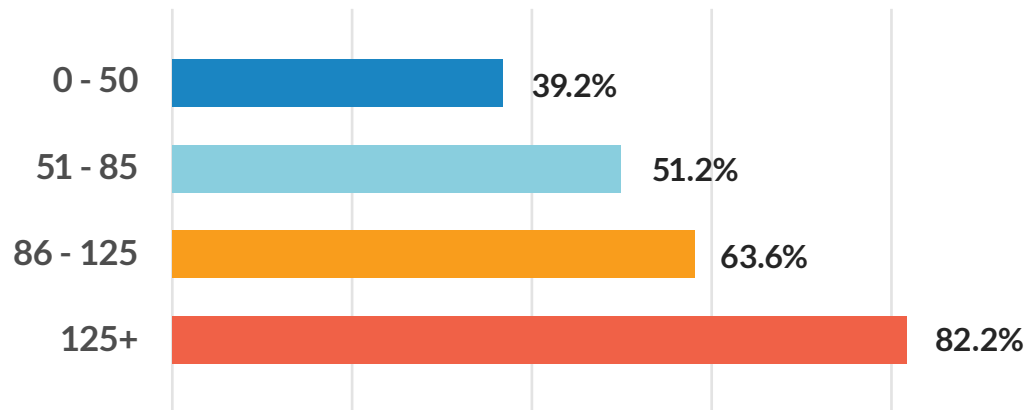
3.44 Caregiver Benefits Provided for 2020 - Number of Caregivers Employed

Type of Benefit	0 - 50	51 - 85	86 - 125	125+
Major Health	24.5%	31.3%	34.1%	58.2%
Travel Reimbursement	47.2%	54.2%	50.0%	55.2%
Dental	17.0%	33.3%	29.5%	50.0%
PTO	47.2%	47.9%	50.0%	49.5%
Supplement (i.e., Aflac)	24.5%	41.7%	52.3%	46.9%
401K Matching	17.0%	37.5%	43.2%	45.9%
Sick Leave	37.7%	39.6%	29.5%	43.3%
Daily/Weekly Pay:Caregivers	32.1%	20.8%	27.3%	38.1%
Education Reimbursement	22.6%	25.0%	18.2%	24.7%
FSA or Cafeteria Plan	3.8%	10.4%	2.3%	8.2%
Profit Sharing	1.9%	8.3%	4.5%	6.2%
Childcare or Daycare Service for Caregivers	3.8%	0.0%	0.0%	1.5%
DCAP (Depend Care Assistance Program)	0.0%	0.0%	0.0%	1.0%



NUMBER OF CAREGIVERS EMPLOYED

3.45 Median Caregiver Turnover Rate - Number of Caregivers Employed

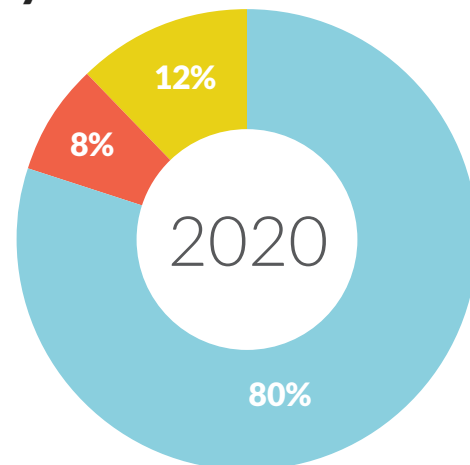


These numbers make it clear that higher levels of staffing may often bring increasing risks of higher turnover; however, there are several things to keep in perspective. The correlation between agency size and caregiver turnover is much stronger when agency size is measured by number of caregivers employed as opposed to agency revenue. This suggests that the real driver of turnover in this correlation may be staffing practices related to caregiver volume, rather than the size of the agency—employing many caregivers in short shifts, for example.

In short, the message of this graph should not be that agency growth always brings higher turnover; rather, that with growth comes the need to continually evaluate staffing practices and double-down on retention initiatives.

NUMBER OF CAREGIVERS EMPLOYED

3.46 Percentage of Agencies Who Have Caregivers Working for Multiple Organizations Simultaneously



- **Yes, Have Caregivers Working for Multiple Organizations**
- **No, Do Not Have Caregivers Working for Multiple Organizations**
- **I Don't Know**

Survey participants were asked, "Are your caregivers working for multiple organizations?"



ARTICLE

Feeling the Burn and Turn

Insights on Caregiver Recruiting, Selection, Onboarding, and Retention

**Jensen Jones**

COO of Caregiver Quality Assurance |
The Home Care CEO Forum

**Jill Scott**

Manager of Member Services |
The Home Care CEO Forum

There are many reasons why recruitment and retention are consistently in the top three burning issues for agencies. To have a successful recruitment, onboarding, and retention plan, it's important to define the intent and how-to behind each step in the workflow. At Caregiver Quality Assurance (CQA), we focus our strategies and discussions around five phases to create a structured process.

Phase I - The Caregiver Quality Company Culture

Phase II - The Caregiver Quality Recruiting System

Phase III - The Caregiver Quality Selection System

Phase IV - The Caregiver Quality Onboarding System

Phase V - The Caregiver Quality Retention System

CQA has found that caregiver turnover costs agencies an average of \$1650 per bad hire. We also know from the benchmarking study that the average turnover rate last year was 65.2%, and 80% of turnover happens in the first 90 days. Imagine that you have an agency with 100 caregivers. That means in the last year, 64 of them turned over, and that cost you \$105,600. You can do a lot of recruiting and retention for a hundred thousand dollars.

Company Values and Culture: Set the Stage

If asked, would your staff know your company's core values?

Values are your agency's core beliefs that guide your actions and decisions. Every agency should have no more than 3 to 5 well-defined values to utilize as their guiding lights. The culture of your company is, simply, the behavior you allow in reflection to those values.

Recruiting & Selection: Make it so simple to apply it surprises them

Can you successfully simplify the application process and save your staff time?

Short applications (Name, Address, Phone, and Email) are becoming widely utilized in the industry to simplify the application. In conjunction, screening questions attached to that application are gaining traction as well (in lieu of the traditional phone screen). There are also various ways to marry technology and automation with these best practices.

Technology has made significant gains in ways to perform these actions without the need for staff involvement until the time of the interview. All the while, the potential candidate is receiving immediate feedback as to where they are in the process. By leveraging an automated workflow,



agencies can screen and have potential candidates schedule their interviews at a time they so choose all within a matter of minutes. Technology and automation are able to domino throughout the workflow, saving valuable time and resources for staff and agency owners. This isn't necessarily a replacement to traditional processes; it can complement your current processes and help reduce the amount of time teams are spending on phone screening, interviews, and orientations.

Onboard-ing: Friend or Firing Squad

Does your interview feel like a conversation or an interrogation?

First impressions are key, and at times, interviewers fail to remember that during an interview, they are also being interviewed and assessed. Having a long list of skills questions and taking a check-the-box approach to interviewing makes the experience very transactional. Caregivers won't feel a connection to your organization. They have already heard these questions and have memorized the answers you want to hear—save the skills assessment for later.

Having a handful of behavioral questions turns the interview into a conversation. “Are you able to...” and “Give me an example” sound very different from “Tell me about a time you...” or “Walk me through a time when....” Conversations lead to rapport building, and it is generally recognized that the more someone talks, the more they are building trust and rapport with you. By allowing them to share an applicable scenario with you, you're going to get a better sense of the type of care provider this individual is and whether or not they fit within your agency's values and culture. Making a great first impression, providing a different experience, and building that connection with that potential caregiver all set the stage for better retention.



Retention: Compensation and Appreciation

“Money Matters More in Recruiting Than in Retention” –Stephen Tweed

Do you know how much your new hires need to make in order to stay engaged?

Yes, having competitive hourly wages is important, but it's not everything. Competitive hourly wage rates will get caregivers in the door, but it doesn't necessarily determine the retention factor. Imagine your agency pays \$17.00 an hour, and as a caregiver, I need to earn \$1000 every pay period. That hourly rate sounds good but means nothing if my paycheck comes up short. I am then forced to look for more work somewhere else to make up the difference. In contrast, what if my agency paid \$12.50 an hour? If I'm earning \$1000+ each pay period, then my needs are met, and the likelihood of me needing to look for supplemental income elsewhere goes away.

I would like to challenge agencies to ask your newly hired caregivers this question: how much per pay period do they need to make? Back into the total number of hours

they need by your agency to hit their earning targets and assign someone the responsibility of monitoring these dynamic Key Performance Indicators (KPI's) for all new hires within their first 90 days. Measure the difference in turnover over the previous 90 days (before this was monitored).

What Gets Measured Gets Managed

What does your 90-day retention plan look like? What is your KPI target around retention? Is this a shared KPI? How well-defined are the expectations to staff regarding their responsibility to hit that KPI standard?

We had a poignant conversation with a recruiter who was frustrated and burned out. This employee didn't feel like their efforts were appreciated because this agency had 100% turnover in the first 90-days. All of their hard work wasn't being supported on the back end. This was expensive for the agency and morally deflating for this recruiter.

Not all hires are going to be good hires—we all understand that—and determining an acceptable turnover rate will be up to each agency. Knowing where you stand now and working on lowering your rate is within each agency's



control. By creating a shared 90-day turnover KPI for your agency (or offices), you are now able to measure and manage retention. If your current turnover rate is 90% in the first 90-days, set a timely KPI goal of reducing that number by 5% to 10% each quarter. Providing transparency around this number and setting an expectation with your staff forces them to work together to create an intentional 90-day retention strategy.

The important piece in retention is making the decision to create a structured program that can be delegated throughout the organization as a standard that is consistent and repeatable.

Feeling Appreciated and Seen Matters

What happens after 90-days?

We all like to feel appreciated. I wish there were a better word besides retention when talking about keeping our most valued employees. Nobody wants to be retained; they want to be invested in, and they want to be seen and valued. Employees want to feel like they're a part of something bigger than themselves. Thus, if we fail to

have intent behind acknowledging our workforce in a consistent and genuine manner, we will continue to have this turn-and-burn effect.

Final Thoughts

If you were to apply and go through your hiring process, would you be excited about working for you?

There is no single solution when it comes to recruiting and retention. By dissecting each portion of your workflow based on your company's unique circumstances and core values, you can continue to improve and come up with creative solutions. Leverage technology, simplify processes, and improve the overall experience for the caregivers, your office team, and ultimately your clients. Make a plan!

If you would like to discuss further, please feel free to reach out to jensen@jnmintegrators or inquire at www.caregiverquality.com. I'd be more than happy to help further flesh out some of these discussion topics. 🏠

ABOUT THE AUTHORS

Jensen Jones is the COO of Caregiver Quality Assurance and owner of Jensen Morgan & Jones. He completed his MBA in 2016 from the University of Oregon and currently facilitates, coaches, and consults for Home Care/Home Health agencies. He has been a caregiver providing end-of-life care for his father and dementia Alzheimer's care to his mother. Jensen was President of a home care agency for several years and enjoys helping others in the industry grow.

Jill Scott is Manager of Member Services for the Home Care CEO Forum. She manages the details for Home Care Mastermind Groups hosted by The Forum and the Caregiver Quality Assurance program. The Home Care CEO Forum is a division of Leading Home Care ... a Tweed Jeffries company. Prior to joining Leading Home Care, Jill spent ten years as a legal assistant with the law firm of Hirschler Fleischer in Richmond, VA. She has a master's degree in psychology with a specialization in Sport from Capella University. Jill works from her home in Pittsburgh, PA while raising her two young boys.





Brandi Kurtyka

CEO | myCNAjobs

ARTICLE

Caregiver Wage Guide

Trends, Minimum Wage, & Perspective

Caregiver wages will take center stage this year. We're operating in a pandemic under a new administration alongside a workforce requesting increased pay. The wage a caregiver is willing to work for has steadily increased year over year, increasing from \$12.68 to \$13.02 for companions and \$13.34 to \$13.69 for CNAs and HHAs over the past 12 months. Meanwhile, reimbursement rates have remained stagnant.

This guide provides a quick overview of the latest state data, current minimum wage rates, and trends in the labor market.

Workers deserve a living wage and it's tough to put a price tag on someone that cares for your loved one. However, there are underlying challenges we'll need to navigate if the proposed \$15 minimum wage bill is put into effect without consideration of other factors including rising unemployment, increasing prices for the elderly, and agencies turning away Medicaid patients.

It's a challenge that will take many of us to navigate, ensuring the best outcomes for our workforce, seniors, and our businesses. We're hopeful it's a conversation the government entertains from multiple perspectives. 🏠

ABOUT BRANDI

Brandi Kurtyka is a nationally known expert and speaker on caregiver recruitment, retention, and motivation. She co-founded myCNAjobs ten years ago, serves as the CEO, and is the author of the Caregiver Trend Report. Kurtyka regularly speaks at leading industry events across the nation, inspiring audiences to change the culture of a broken industry. Her unique insights stem her team's front-row seat into the complexities and challenges of the front-line labor market. Her expertise helps healthcare organizations understand and rethink recruitment and retention strategies.

\$13.02

No Certification

\$12.68	\$11.72	\$11.37
2020	2019	2018

\$13.69

CNA/HHA Cert

\$13.34	\$12.34	\$12.11
2020	2019	2018

2021 NATIONAL AVERAGES

This data is taken from the 2021 National Pay Trends Report. To see trends in your local area, visit myCNAjobs.com/pay.



Average Hourly Wage Caregivers Are Willing to Work For

State	No Cert	CNA/HHA
Alabama	\$11.40	\$11.84
Alaska	\$14.84	\$15.63
Arizona	\$13.62	\$14.47
Arkansas	\$11.75	\$12.24
California	\$14.95	\$15.81
Colorado	\$14.29	\$15.37
Connecticut	\$14.13	\$14.64
Delaware	\$13.07	\$13.84
DC	\$15.34	\$15.34
Florida	\$12.97	\$13.40
Georgia	\$12.31	\$12.50
Hawaii	\$14.91	\$15.91
Idaho	\$12.12	\$13.39
Illinois	\$13.39	\$14.07
Indiana	\$12.36	\$13.59
Iowa	\$12.90	\$14.44
Kansas	\$12.16	\$12.92
Kentucky	\$12.18	\$13.12
Louisiana	\$11.18	\$11.50
Maine	\$14.16	\$15.14
Maryland	\$14.15	\$14.50
Massachusetts	\$15.22	\$15.82
Michigan	\$12.50	\$13.67
Minnesota	\$14.40	\$15.15
Mississippi	\$11.11	\$11.63
Missouri	\$12.13	\$12.84

State	No Cert	CNA/HHA
Montana	\$12.92	\$13.88
Nebraska	\$12.92	\$14.02
Nevada	\$13.18	\$14.05
New Hampshire	\$14.42	\$15.64
New Jersey	\$14.36	\$14.86
New Mexico	\$12.14	\$13.63
New York	\$15.20	\$15.33
North Carolina	\$11.96	\$12.24
North Dakota	\$14.37	\$15.43
Ohio	\$12.20	\$12.94
Oklahoma	\$11.81	\$12.51
Oregon	\$14.18	\$15.82
Pennsylvania	\$12.67	\$13.78
Rhode Island	\$14.32	\$15.46
South Carolina	\$12.01	\$12.66
South Dakota	\$12.97	\$14.58
Tennessee	\$11.85	\$12.74
Texas	\$12.27	\$13.31
Utah	\$13.34	\$13.64
Vermont	\$14.48	\$15.23
Virginia	\$12.66	\$12.80
Washington	\$15.03	\$16.38
West Virginia	\$11.23	\$12.56
Wisconsin	\$12.76	\$14.11
Wyoming	\$12.80	\$14.52

● Above National Avg. ● Below National Avg.

A CAREGIVER'S PERSPECTIVE

I have been a caregiver for over 2 years and I absolutely love it. However, I think the way you keep good workers wanting to work is paying them well. We do a lot of work but very underpaid.



Eliezer
Caregiver

Minimum wage is supposed to go up to \$15 an hour.



Libia
Caregiver

I do not work for anyone but work privately...I carry my own professional liability insurance and bond...plus my 30 years experience and I market myself higher.



Mariola
Caregiver



This data is taken from the 2021 National Pay Trends Report. To see trends in your local area, visit myCNAjobs.com/pay. This data does not represent actual wages but rather the wages caregivers indicated they would be willing to work for as a caregiver.



MINIMUM WAGE

Federal
Minimum
Wage:

\$7.25

Will this be raised
in 2021?

● Minimum Wage
Increases

*Data Updated
January 25, 2021

State	2021*	2019	2018
Alabama	\$7.25	\$7.25	\$7.25
Alaska	\$10.34	\$10.19	\$9.84
Arizona	\$12.15	\$12.00	\$10.50
Arkansas	\$11.00	\$9.25	\$8.50
California	\$13.00	\$12.00	\$11.00
Colorado	\$12.32	\$12.00	\$10.20
Connecticut	\$12.00	\$11.00	\$10.10
Delaware	\$9.25	\$9.25	\$8.25
DC	\$15.00	\$14.00	\$13.25
Florida	\$8.65	\$8.56	\$8.25
Georgia	\$7.25	\$5.15	\$5.15
Hawaii	\$10.10	\$10.10	\$10.10
Idaho	\$7.25	\$7.25	\$7.25
Illinois	\$11.00	\$9.25	\$8.25
Indiana	\$7.25	\$7.25	\$7.25
Iowa	\$7.25	\$7.25	\$7.25
Kansas	\$7.25	\$7.25	\$7.25
Kentucky	\$7.25	\$7.25	\$7.25
Louisiana	\$7.25	\$7.25	\$7.25
Maine	\$12.15	\$12.00	\$10.00
Maryland	\$11.75	\$11.00	\$10.10
Massachusetts	\$13.50	\$12.75	\$11.00
Michigan	\$11.75	\$9.65	\$9.25
Minnesota	\$10.08	\$10.00	\$9.86
Mississippi	\$7.25	\$7.25	\$7.25
Missouri	\$10.30	\$9.45	\$7.85

State	2021*	2019	2018
Montana	\$8.75	\$8.30	\$8.30
Nebraska	\$9.00	\$9.00	\$9.00
Nevada	\$9.00	\$8.25	\$8.25
New Hampshire	\$7.25	\$7.25	\$7.25
New Jersey	\$12.00	\$11.00	\$8.60
New Mexico	\$10.50	\$9.00	\$7.25
New York	\$12.50	\$11.80	\$10.40
North Carolina	\$7.25	\$7.25	\$7.25
North Dakota	\$7.25	\$7.25	\$7.25
Ohio	\$8.80	\$8.70	\$8.30
Oklahoma	\$7.25	\$7.25	\$7.25
Oregon	\$12.00	\$11.25	\$10.75
Pennsylvania	\$7.25	\$7.25	\$7.25
Rhode Island	\$11.50	\$10.10	\$10.10
South Carolina	\$7.25	\$7.25	\$7.25
South Dakota	\$9.45	\$9.30	\$8.85
Tennessee	\$7.25	\$7.25	\$7.25
Texas	\$7.25	\$7.25	\$7.25
Utah	\$7.25	\$7.25	\$7.25
Vermont	\$11.75	\$10.96	\$10.50
Virginia	\$7.25	\$7.25	\$7.25
Washington	\$13.69	\$13.50	\$11.50
West Virginia	\$8.75	\$8.75	\$8.75
Wisconsin	\$7.25	\$7.25	\$7.25
Wyoming	\$7.25	\$5.15	\$5.15



Home Care Pulse merged with In the Know & acquired Home Care Institute.

Home Care Pulse Training

500+ Course Employee Training Library for Post-Acute Care

Home Care Pulse, In the Know, and Home Care Institute are now one company offering training to caregivers, clinicians, and office staff in home care, home health, and hospice.

Subscribers to our eLearning library gain unlimited access to:

- ✓ 300+ Caregiver CE courses, approved in all states.
- ✓ 100+ ANCC accredited clinician courses.
- ✓ 40+ courses translated into Spanish (with more being added all the time).
- ✓ A 12-Module Home Care Supervisor Success Series.
- ✓ Courses from Caregivers Kitchen, Culinary Skills for Caregivers series.
- ✓ 200+ Instructor-led training modules for a unique blended learning solution.



Key Features:



Learning can take place anytime, anywhere, on any type of device.



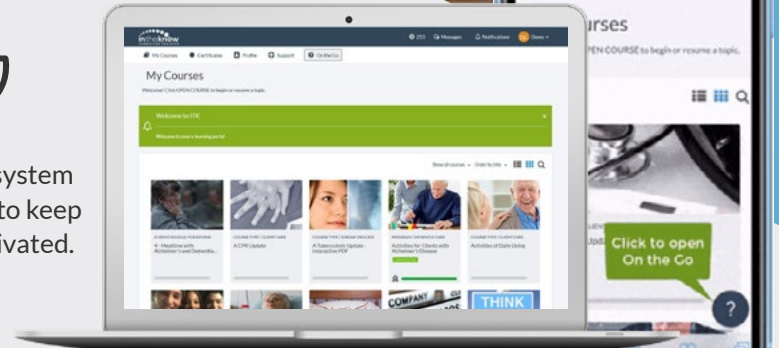
On-the-go training resource access for caregivers.



Training managers can easily track learners' progress and view reports.



Gamification system awards points to keep everyone motivated.



Watch an Instant Demo Today

Visit www.knowingmore.com/access-video-demo to preview our platform.

Watch Now

Finance

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Executive Summary

Sales & Marketing

Recruitment & Retention

Finance

Operations

Technology

Client/Caregiver Experience

Best of Home Care



SUMMARY

FINANCE

The Finance section provides insight into the financial workings of home care providers in the home care industry. It contains many data points dealing with revenue, expenses, billing rates, and payer sources.

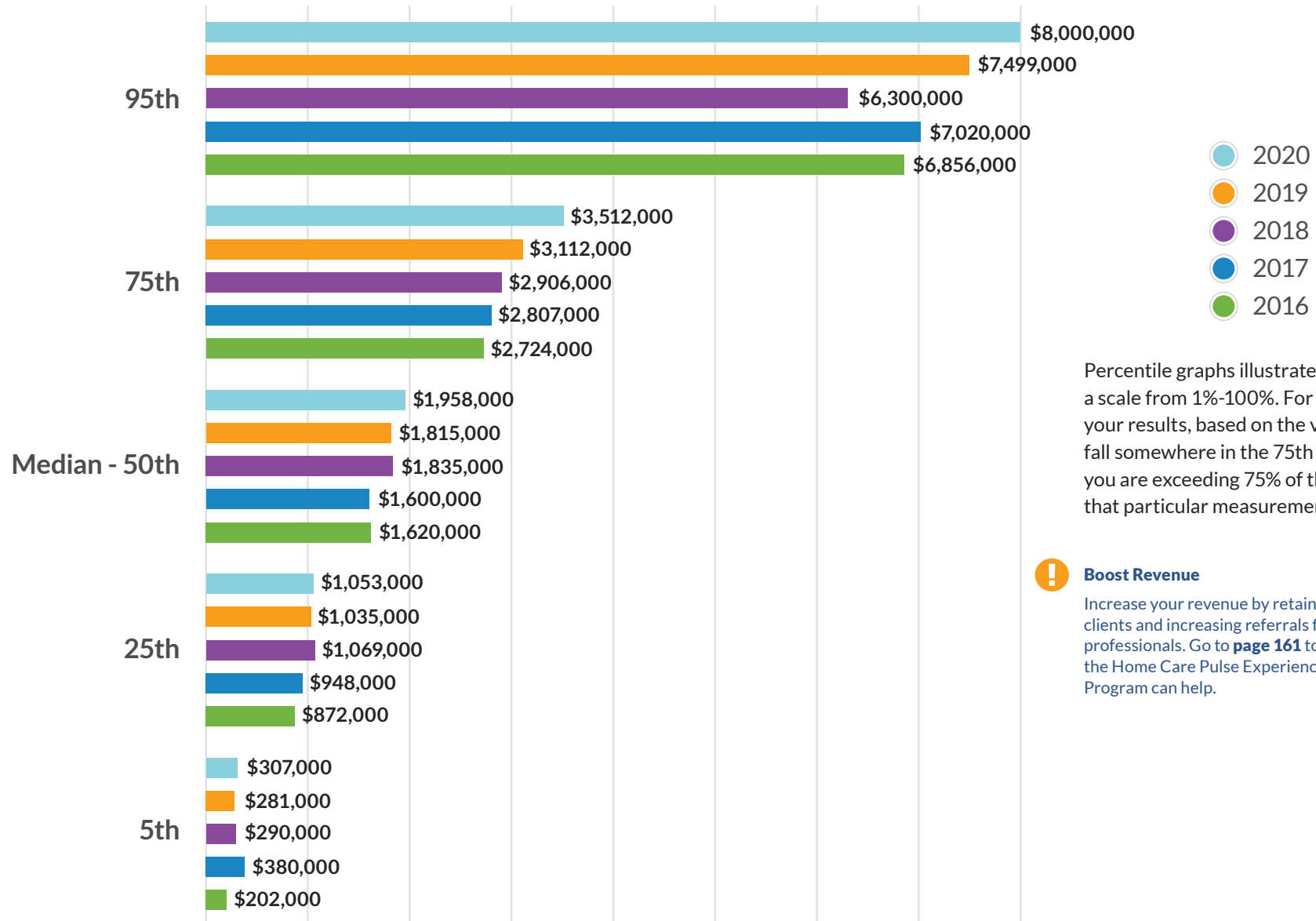
The insights in this section are useful in comparing the finances of your business relative to the finances of other providers in your region, your revenue range, or the industry as a whole. For example, the Profit and Loss Comparisons show the median percentages that home care providers pay for various expenses. By comparing your own financial records against these numbers, you can identify whether you are paying a disproportionate amount in one area. This may alert you to changes you can make in your business to become more competitive.





REVENUE PERCENTILE RANKINGS

4.1 Historical Revenue Percentile Rankings



Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



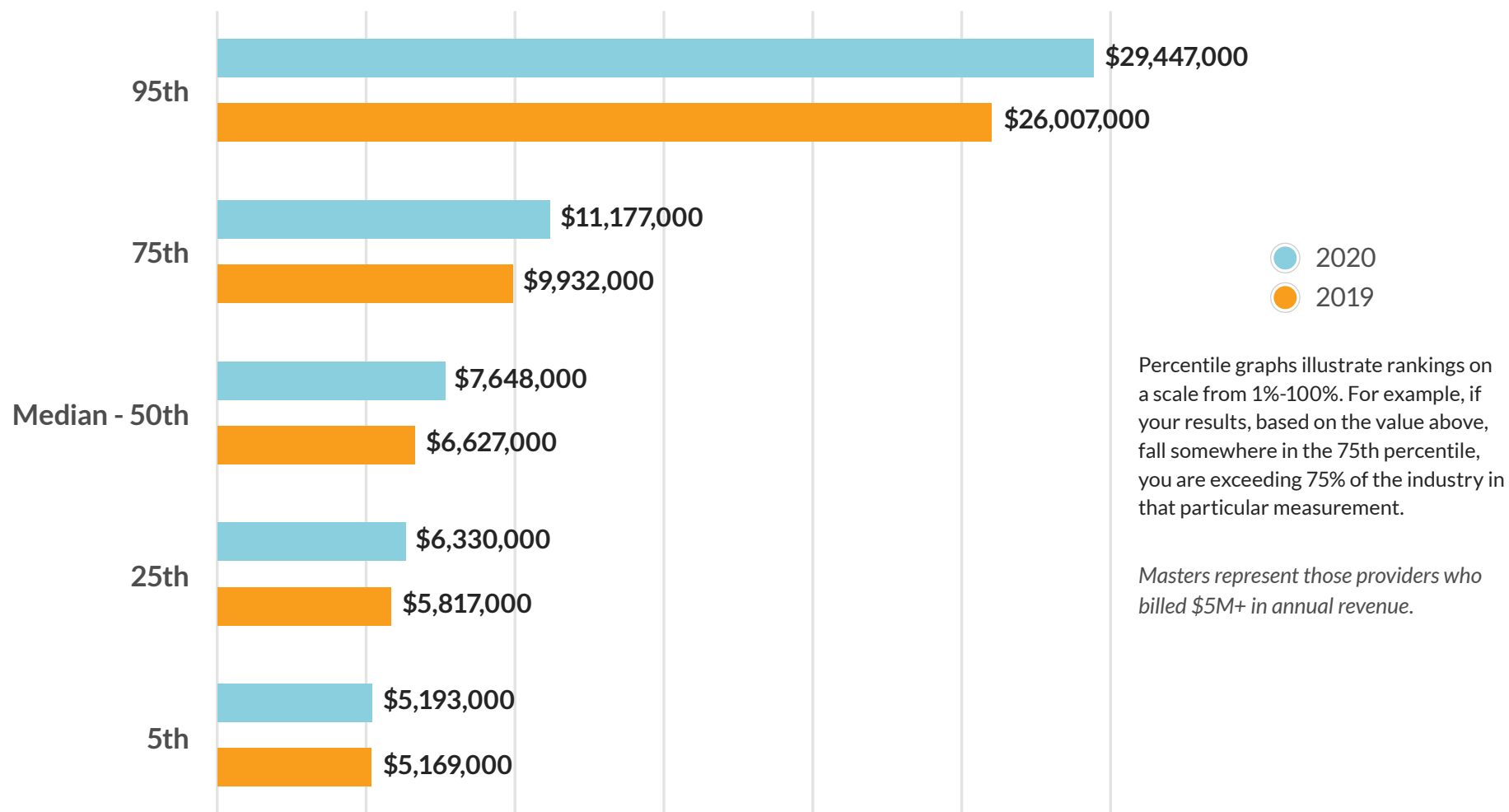
Boost Revenue

Increase your revenue by retaining more clients and increasing referrals from clients and professionals. Go to **page 161** to learn how the Home Care Pulse Experience Management Program can help.



REVENUE PERCENTILE RANKINGS

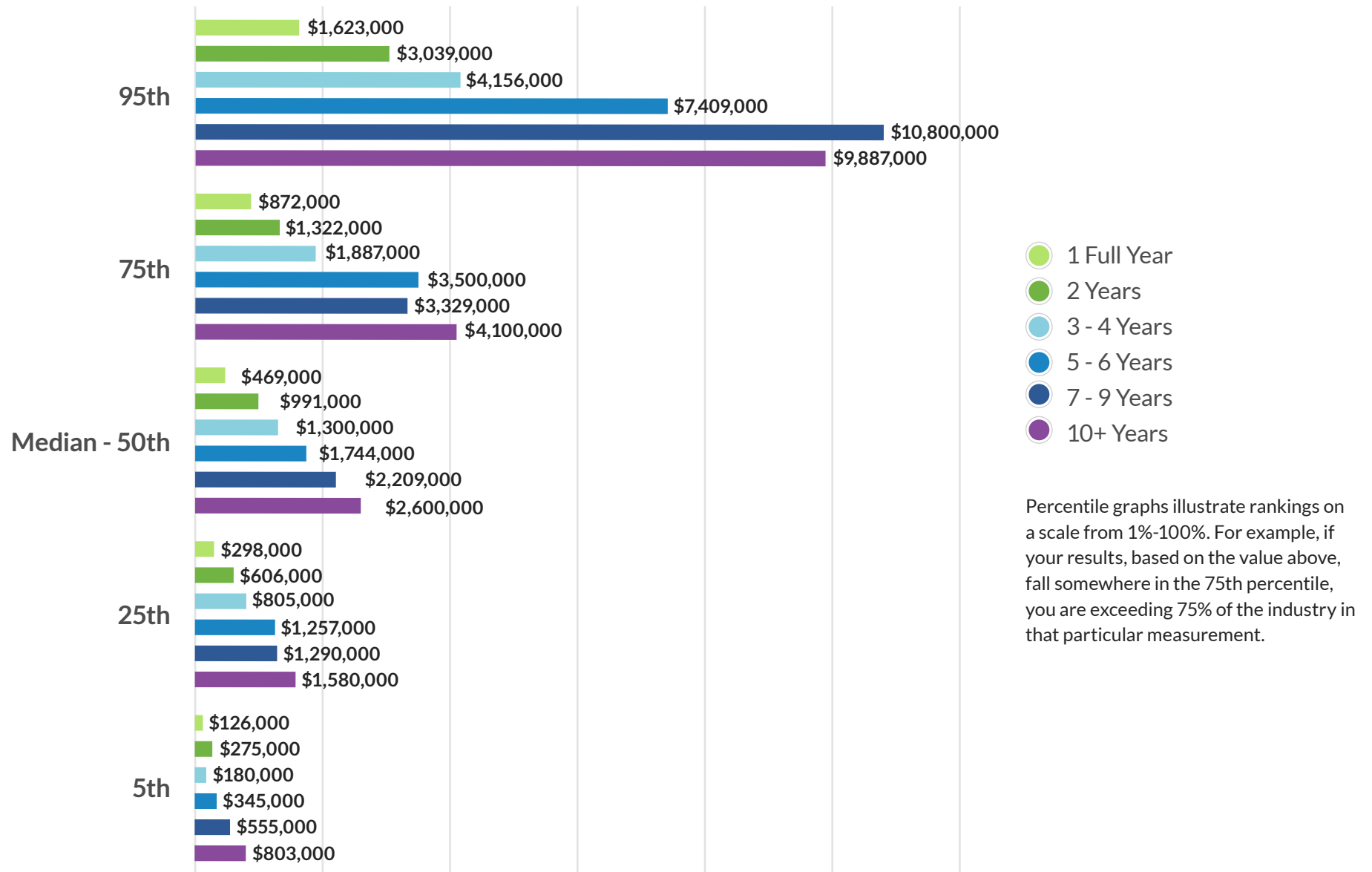
4.2 Historical Revenue Percentile Rankings - Masters





REVENUE PERCENTILE RANKINGS

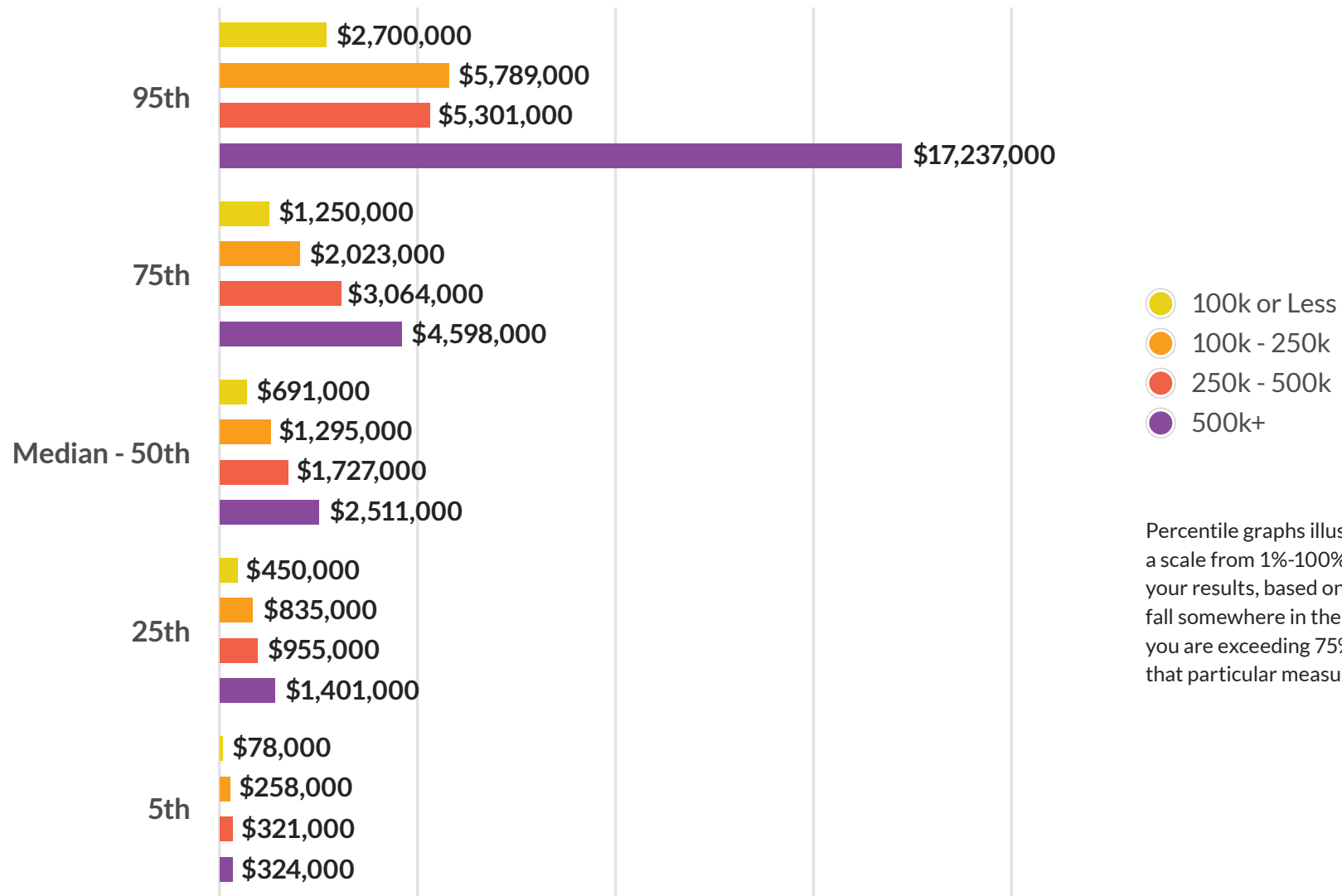
4.3 Revenue Percentile Rankings for 2020 - Years in Business





REVENUE PERCENTILE RANKINGS

4.4 Revenue Percentile Rankings for 2020 - Population Served

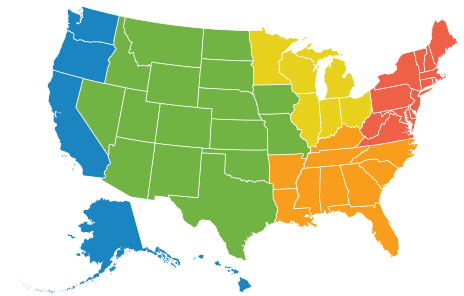
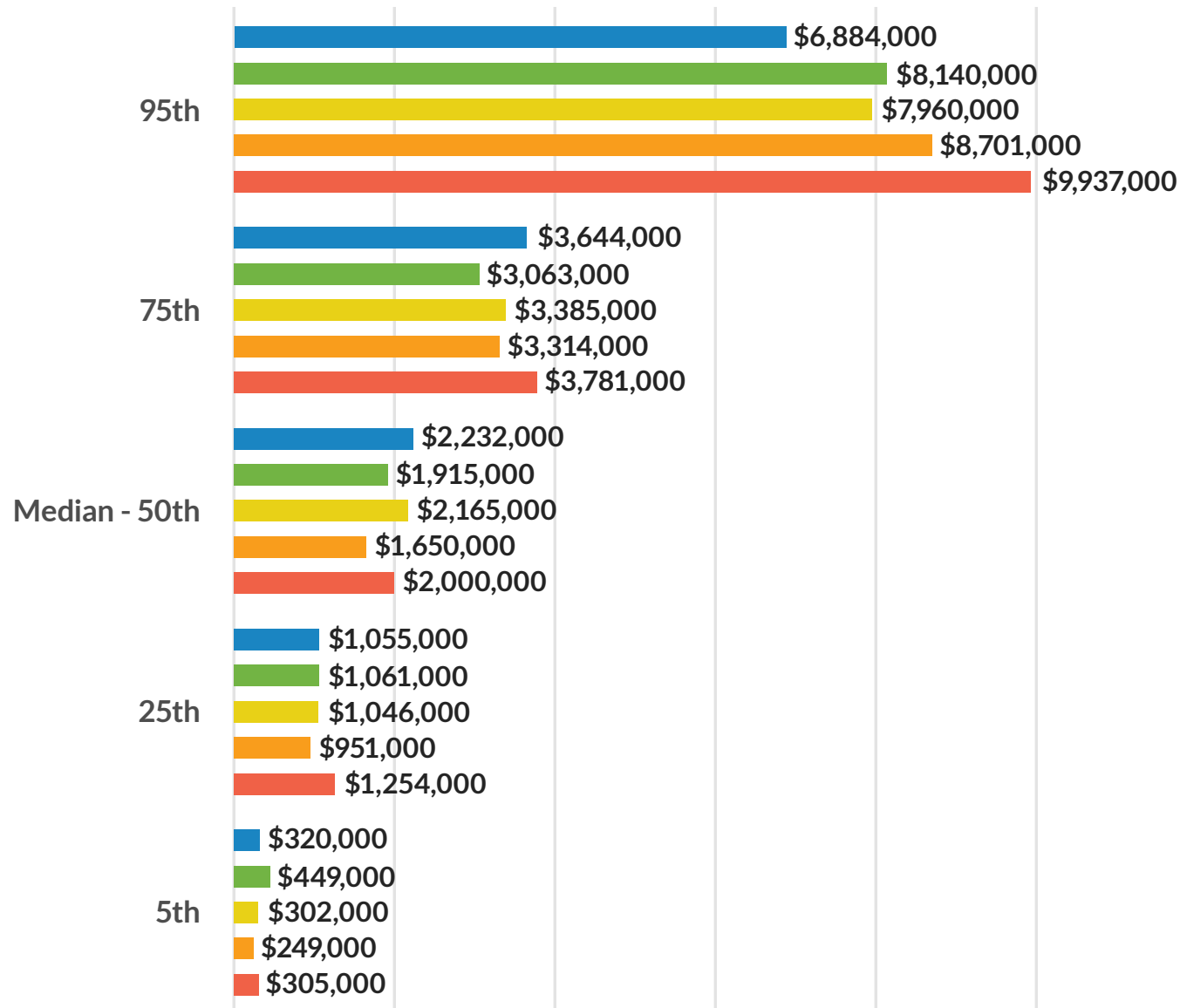


Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



REVENUE PERCENTILE RANKINGS

4.5 Revenue Percentile Rankings for 2020 - Geographic Region



- Pacific
- Central
- Great Lakes
- Southern
- Northeast

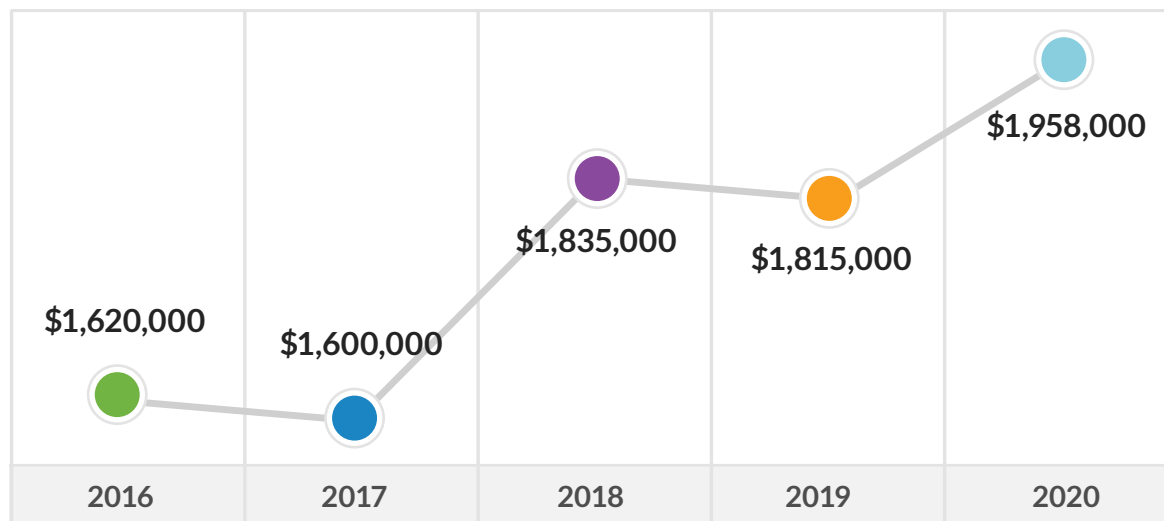
Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.



MEDIAN REVENUE

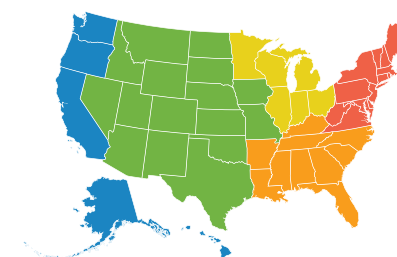
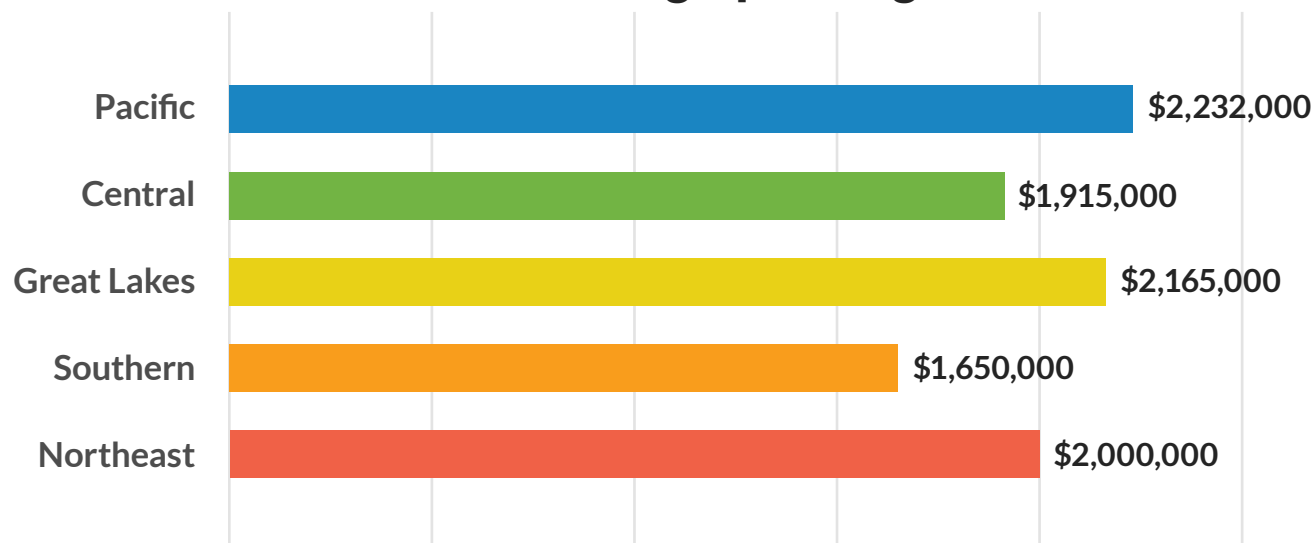
4.6 Historical Median Revenue

Median Revenue for the industry has grown by 20.9% over the past 5 years.



MEDIAN REVENUE

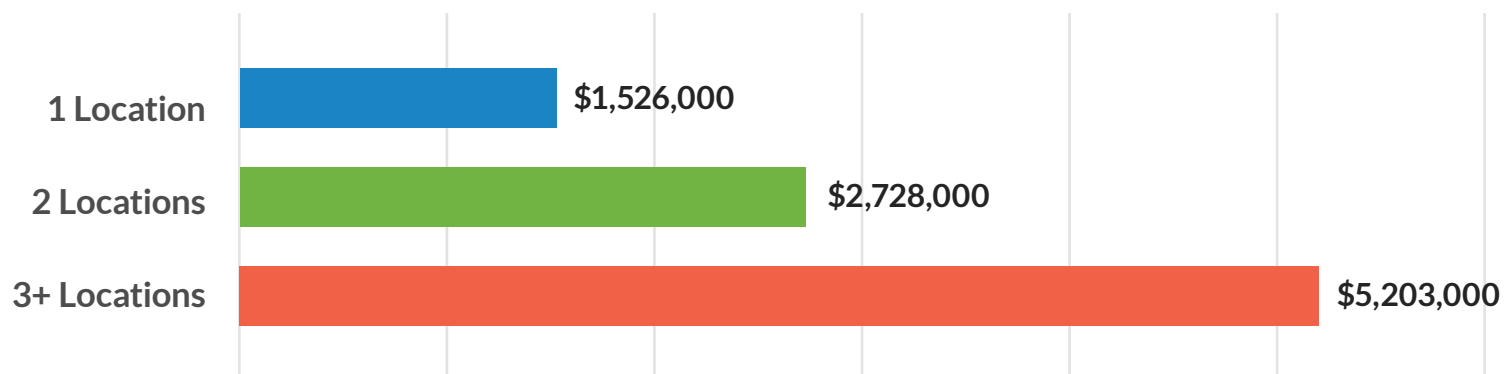
4.7 Median Revenue for 2020 - Geographic Region





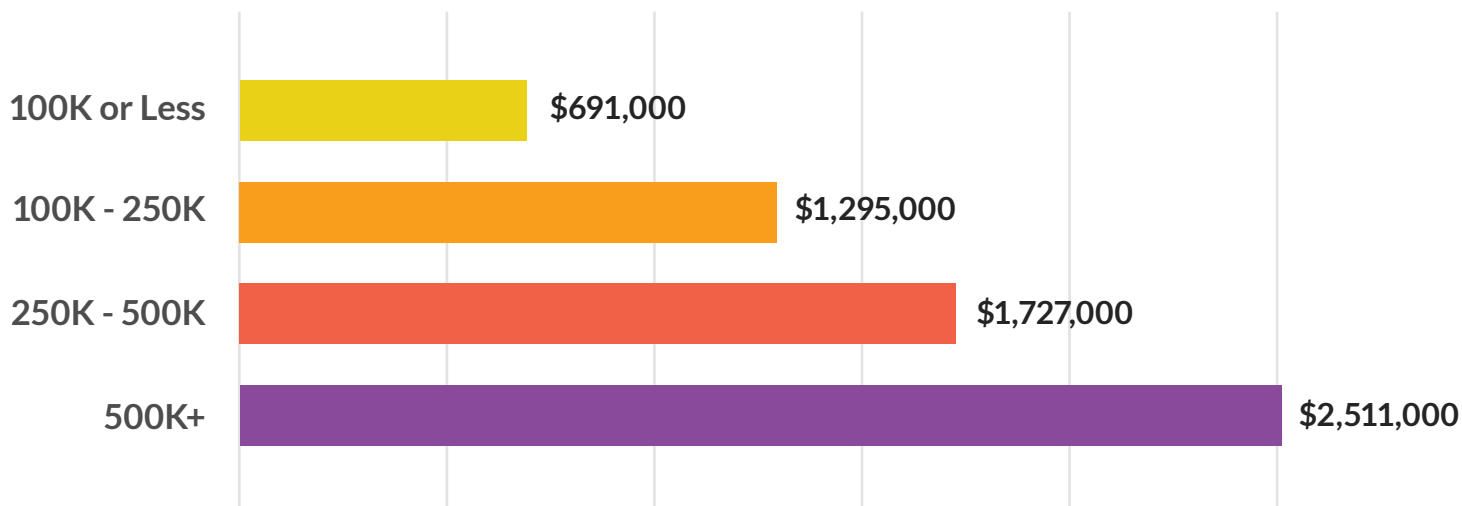
MEDIAN REVENUE

4.8 Median Revenue for 2020 - Number of Locations



MEDIAN REVENUE

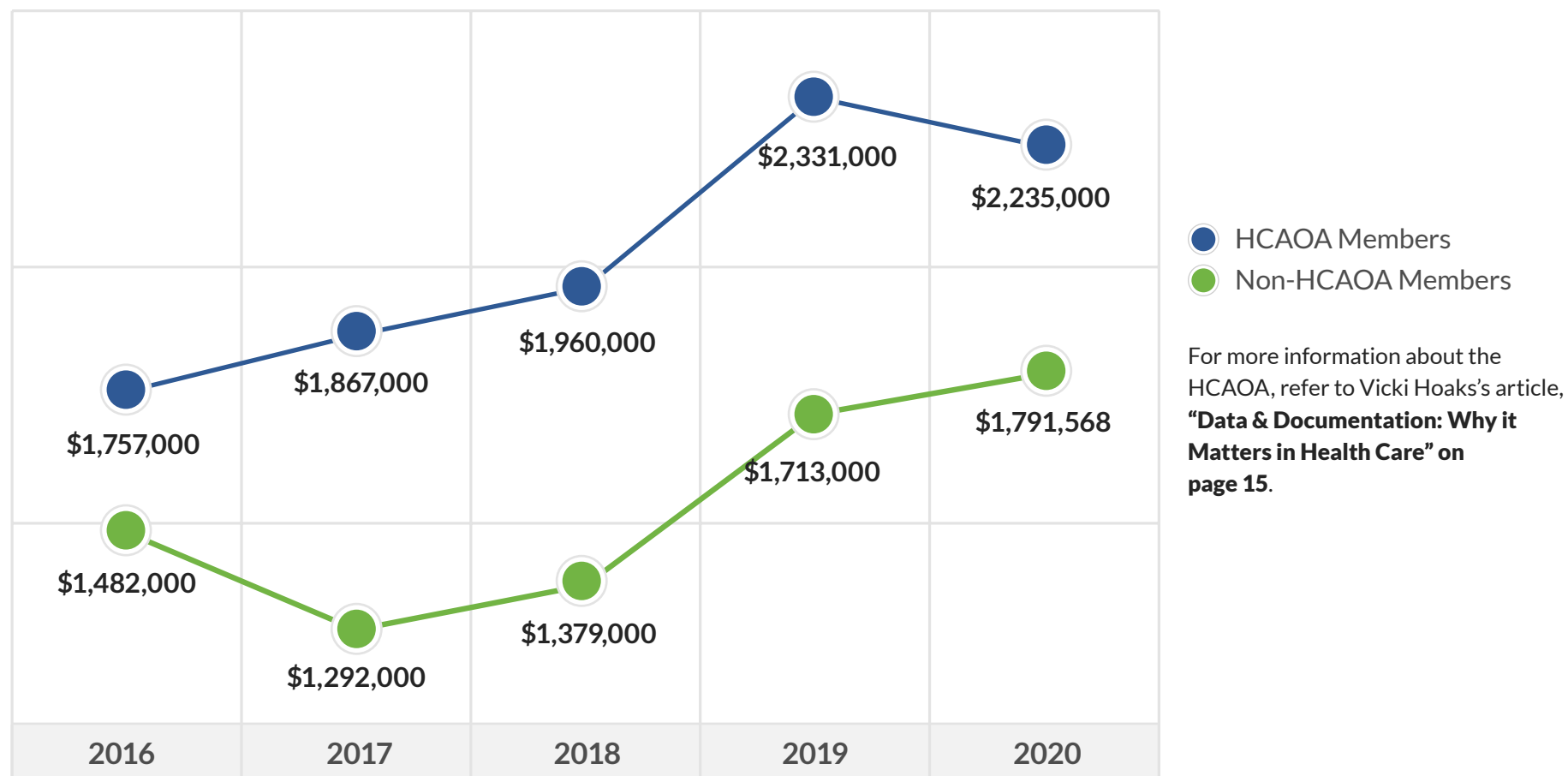
4.9 Median Revenue for 2020 - Population Served





MEDIAN REVENUE

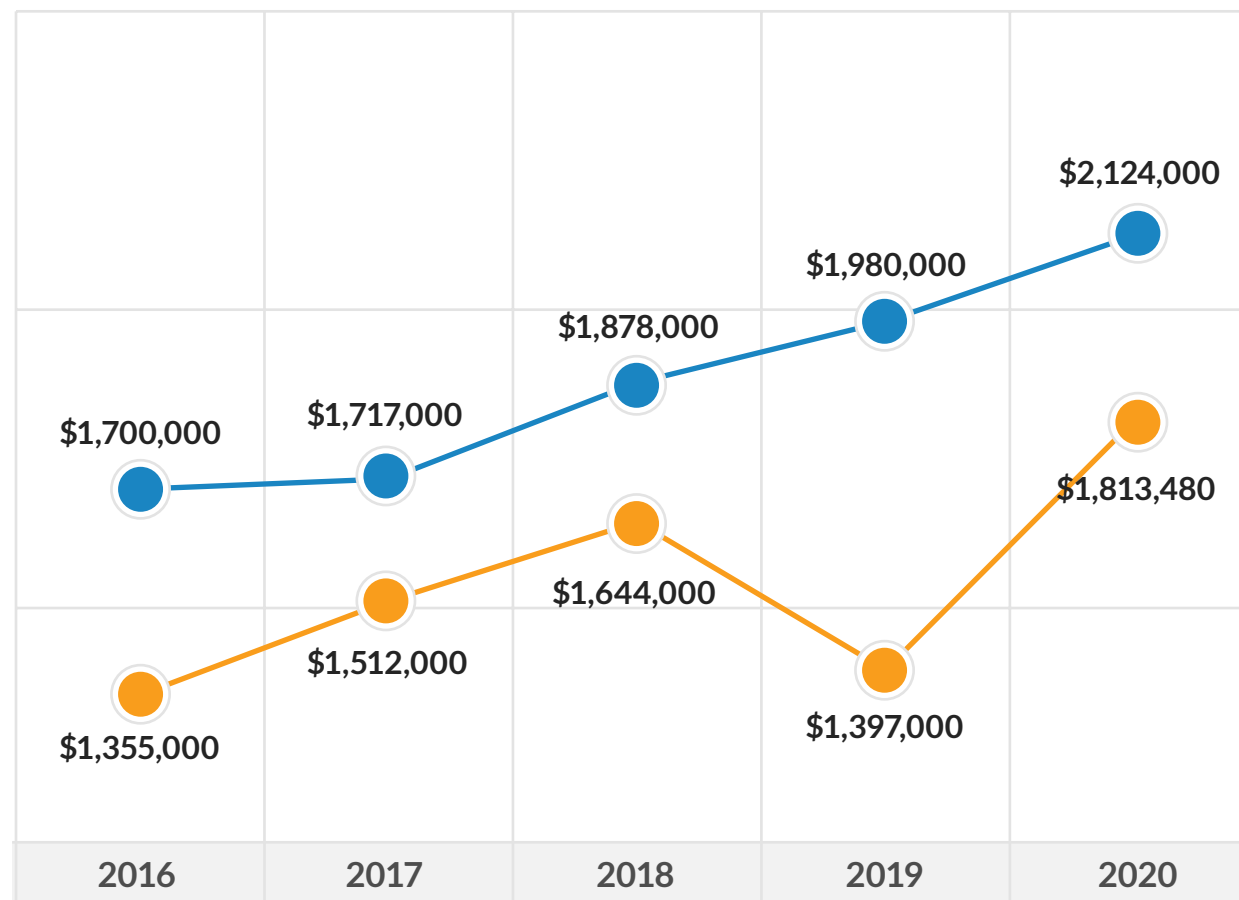
4.10 Historical Median Revenue - HCAOA Members vs. Non-Members





MEDIAN REVENUE

4.11 Historical Median Revenue - Home Care Pulse Experience Management Program Users vs. Non-Users



- Experience Management Users
- Non-Users

In addition to compiling the Annual Home Care Benchmarking Study, Home Care Pulse is the industry leader in experience management. Each month, Home Care Pulse conducts thousands of experience interviews with home care businesses' clients and/or responsible parties and caregivers. This Experience Management Program provides unbiased feedback and detailed reports showing what the provider's clients and caregivers are saying about them.

Go to **page 161** to learn more about the impact of experience management on growth.



PROFIT & LOSS COMPARISONS

Key Profit & Loss Definitions

Direct Care Expenses – These are expenses directly related to caring for clients (not to be confused with the term “Variable Expenses,” which is a common accounting term used for expenses that fluctuate based on revenue). Though many Direct Expenses, such as Caregiver Wages, are also “Variable Expenses,” we use the term “Direct Care Expenses” in order to make the financial data easy to understand and specific to the private duty home care industry.

Caregiver Wages – These are strictly caregiver wages and do not include other employer expenses, such as payroll fees.

Other Direct Care Expenses – This includes any expense related to the Direct Care of clients that is not covered by the other main direct care categories, such as Caregiver Training, Recruitment, Background/Screening Checks, Caregiver Bonuses, and Client Supplies (such as gloves, etc.).

Caregiver Recruitment & Retention – Includes all expenses related to acquiring caregivers including job ads, postings, and networking. Also included are team wages associated with recruiting caregivers, background checks, and screenings. Caregiver retention expenses include recognition programs, bonuses, and efforts to retain caregivers.

Gross Profit Margin (GPM) – Percent of revenue left after Direct Care Expenses.

Indirect Care Expenses – Also known as Fixed Expenses, these expenses are reserved for overhead.

Other Marketing Expenses – Consulting and other expenses not captured in the main marketing categories.

Office Support Wages – Includes all office support staff (office managers, payroll, billing, schedulers, etc.).

Executive Team (Non-Owner) Wages – This category represents top management who are non-owners.

Other Operating Expenses – Includes miscellaneous software, travel, franchise fees (if applicable), staff benefits, etc.

Other Taxes – All other taxes that are non-employee related but related to the operation of the business. Usually these are taxes against profits earned by the business.

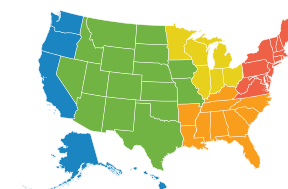
Net Profit or Net Ordinary Income – These are not shown in the key profit and loss comparisons as only key expenses are represented and not necessarily all expenses incurred.

Profit & Loss statements display median values rounded to the nearest tenth. To find the dollar amount associated with each category, multiply the median revenue by the percentage of that category.



4.12 Profit & Loss Comparison for 2020 - Geographic Region

Geographic Region (U.S.)	Pacific	Central	Great Lakes	Southern	Northeast
Median Annual Revenue	\$2,232,000	\$1,915,000	\$2,165,000	\$1,650,000	\$2,000,000
Direct Care Expenses					
Caregiver wages	52.9%	52.5%	54.6%	54.8%	58.7%
Workers comp insurance	2.7%	1.0%	1.1%	1.1%	1.3%
Caregiver benefits (health, 401k, supplemental, etc.)	0.8%	0.8%	0.8%	0.7%	0.7%
Caregiver payroll taxes (employer taxes, unemployment insurance)	5.8%	5.3%	5.7%	4.9%	5.7%
Caregiver reimbursements (mileage, meals, etc.)	0.4%	0.3%	0.3%	0.4%	0.3%
Caregiver ongoing training (not initial training)	0.2%	0.2%	0.5%	0.2%	0.2%
*Other direct care expenses not listed	0.4%	0.7%	0.3%	0.4%	0.4%
Total Direct Care Expenses	63.2%	60.9%	63.3%	62.6%	67.4%
Caregiver Recruitment & Retention Expenses					
Caregiver job ads and networking	0.3%	0.4%	0.4%	0.3%	0.4%
Caregiver background checks and screenings	0.2%	0.2%	0.1%	0.2%	0.2%
Caregiver retention (bonuses, recognition program, satisfaction mgmt)	0.2%	0.3%	0.3%	0.3%	0.3%
Caregiver onboarding and initial training	0.3%	0.3%	0.3%	0.2%	0.2%
Team wages associated with recruiting and retaining caregivers	0.9%	1.7%	1.9%	1.6%	1.5%
Pre-employment assessments	0.1%	0.1%	0.1%	0.1%	0.1%
All other expenses related to recruiting and retaining caregivers	0.2%	0.1%	0.2%	0.2%	0.3%
Total Caregiver Recruitment & Retention Expenses	2.2%	3.1%	3.2%	2.9%	2.9%
Sales & Marketing Expenses					
Traditional advertising (radio, print, etc.)	0.2%	0.4%	0.3%	0.3%	0.3%
Internet advertising (Google Ads, paid ads on Facebook, etc.)	0.4%	0.4%	0.3%	0.4%	0.3%
Networking and events (community, gifts, conventions, etc.)	0.2%	0.2%	0.1%	0.1%	0.1%
Search Engine Optimization (SEO)	0.4%	0.3%	0.3%	0.3%	0.3%
Sales rep salaries	2.1%	2.4%	2.0%	2.1%	2.1%
Sales rep bonuses and perks	0.3%	0.3%	0.2%	0.5%	0.3%
Lead Generation websites (Caring.com, etc.)	0.3%	0.2%	0.1%	0.3%	0.3%
All other marketing-related expenses (consulting, etc.)	0.3%	0.3%	0.2%	0.2%	0.7%
Total Sales & Marketing Expenses	4.1%	4.5%	3.6%	4.3%	4.4%
Operating Expenses					
Rent, maintenance, and utilities	1.5%	2.0%	1.8%	2.0%	1.8%
Office support wages (admins, schedulers, HR staff, nurses)	7.5%	7.9%	8.7%	7.9%	8.6%
Executive team wages (exclude all owners)	3.6%	4.5%	4.3%	4.1%	4.2%
Scheduling software, including telephony	0.4%	0.6%	0.5%	0.5%	0.4%
Franchise royalty fees (if applicable)	4.8%	4.8%	4.5%	5.0%	4.2%
Association/membership dues (if applicable)	0.1%	0.1%	0.1%	0.1%	0.1%
Travel/meals/entertainment expenses	0.1%	0.2%	0.2%	0.3%	0.2%
*Other operating expenses (exclude owners' salary and benefits)	4.8%	2.6%	3.2%	3.1%	4.1%
Total Operating Expenses	22.8%	22.7%	23.4%	22.9%	23.6%



For definitions, please refer to "Key Profit & Loss Definitions" on page 92.

The percentages in the table represent a percent of revenue for each income and expense category. Also, these are median percentages (taking the middle number of the group), and therefore, if an expense says 0.0% this doesn't necessarily mean that the value is 0.0%. 0.0% was simply the median number of the group being represented.

Net Profit or Net Ordinary Income are not shown in the key profit and loss comparisons as only key expenses are represented and not necessarily all expenses incurred.

*Expense Examples

Caregiver payroll taxes - employer taxes, unemployment insurance, etc

Caregiver retention - bonuses, recognition program, satisfaction management, etc.

Networking and events - community, gifts, conventions, trade shows/marketing to clients etc.



4.13 Profit & Loss Comparison for 2020 - Number of Locations

For definitions, please refer to “Key Profit & Loss Definitions” on page 92.

The percentages in the table represent a percent of revenue for each income and expense category. Also, these are median percentages (taking the middle number of the group), and therefore, if an expense says 0.0% this doesn't necessarily mean that the value is 0.0%. 0.0% was simply the median number of the group being represented.

Net Profit or Net Ordinary Income are not shown in the key profit and loss comparisons as only key expenses are represented and not necessarily all expenses incurred.

*Expense Examples

Caregiver payroll taxes - employer taxes, unemployment insurance, etc

Caregiver retention - bonuses, recognition program, satisfaction management, etc.

Networking and events - community, gifts, conventions, trade shows/marketing to clients etc.

Number of Locations	1 Location	2 Locations	3+ Locations
Median Annual Revenue	\$1,526,000	\$2,728,000	\$5,203,000
Direct Care Expenses			
Caregiver wages	55.3%	53.3%	60.6%
Workers comp insurance	1.4%	1.1%	1.3%
Caregiver benefits (health, 401k, supplemental, etc.)	0.8%	0.7%	0.7%
Caregiver payroll taxes (employer taxes, unemployment insurance)	5.6%	5.2%	5.6%
Caregiver reimbursements (mileage, meals, etc.)	0.3%	0.4%	0.3%
Caregiver ongoing training (not initial training)	0.2%	0.2%	0.3%
*Other direct care expenses not listed	0.4%	0.5%	0.3%
Total Direct Care Expenses	64.1%	61.5%	69.1%
Caregiver Recruitment & Retention Expenses			
Caregiver job ads and networking	0.3%	0.4%	0.3%
Caregiver background checks and screenings	0.2%	0.2%	0.1%
Caregiver retention (bonuses, recognition program, satisfaction mgmt)	0.3%	0.3%	0.3%
Caregiver onboarding and initial training	0.2%	0.2%	0.2%
Team wages associated with recruiting and retaining caregivers	1.7%	1.6%	1.1%
Pre-employment assessments	0.1%	0.1%	0.1%
All other expenses related to recruiting and retaining caregivers	0.2%	0.3%	0.1%
Total Caregiver Recruitment & Retention Expenses	3.1%	3.0%	2.2%
Sales & Marketing Expenses			
Traditional advertising (radio, print, etc.)	0.3%	0.3%	0.2%
Internet advertising (Google Ads, paid ads on Facebook, etc.)	0.4%	0.2%	0.2%
Networking and events (community, gifts, conventions, etc.)clients, etc.)	0.2%	0.2%	0.1%
Search Engine Optimization (SEO)	0.4%	0.3%	0.2%
Sales rep salaries	2.2%	2.0%	2.1%
Sales rep bonuses and perks	0.4%	0.4%	0.2%
Lead Generation websites (Caring.com, etc.)	0.3%	0.3%	0.1%
All other marketing-related expenses (consulting, etc.)	0.4%	0.2%	0.4%
Total Sales & Marketing Expenses	4.5%	3.9%	3.6%
Operating Expenses			
Rent, maintenance, and utilities	1.9%	1.8%	1.9%
Office support wages (admins, schedulers, HR staff, nurses)	8.4%	7.8%	7.8%
Executive team wages (exclude all owners)	4.6%	3.7%	4.0%
Scheduling software, including telephony	0.4%	0.4%	0.4%
Franchise royalty fees (if applicable)	4.8%	4.7%	4.7%
Association/membership dues (if applicable)	0.1%	0.1%	0.1%
Travel/meals/entertainment expenses	0.2%	0.2%	0.1%
*Other operating expenses (exclude owners' salary and benefits)	3.2%	3.7%	4.0%
Total Operating Expenses	23.6%	22.5%	23.1%



4.14 Profit & Loss Comparison for 2020 - Revenue Ranges

Masters

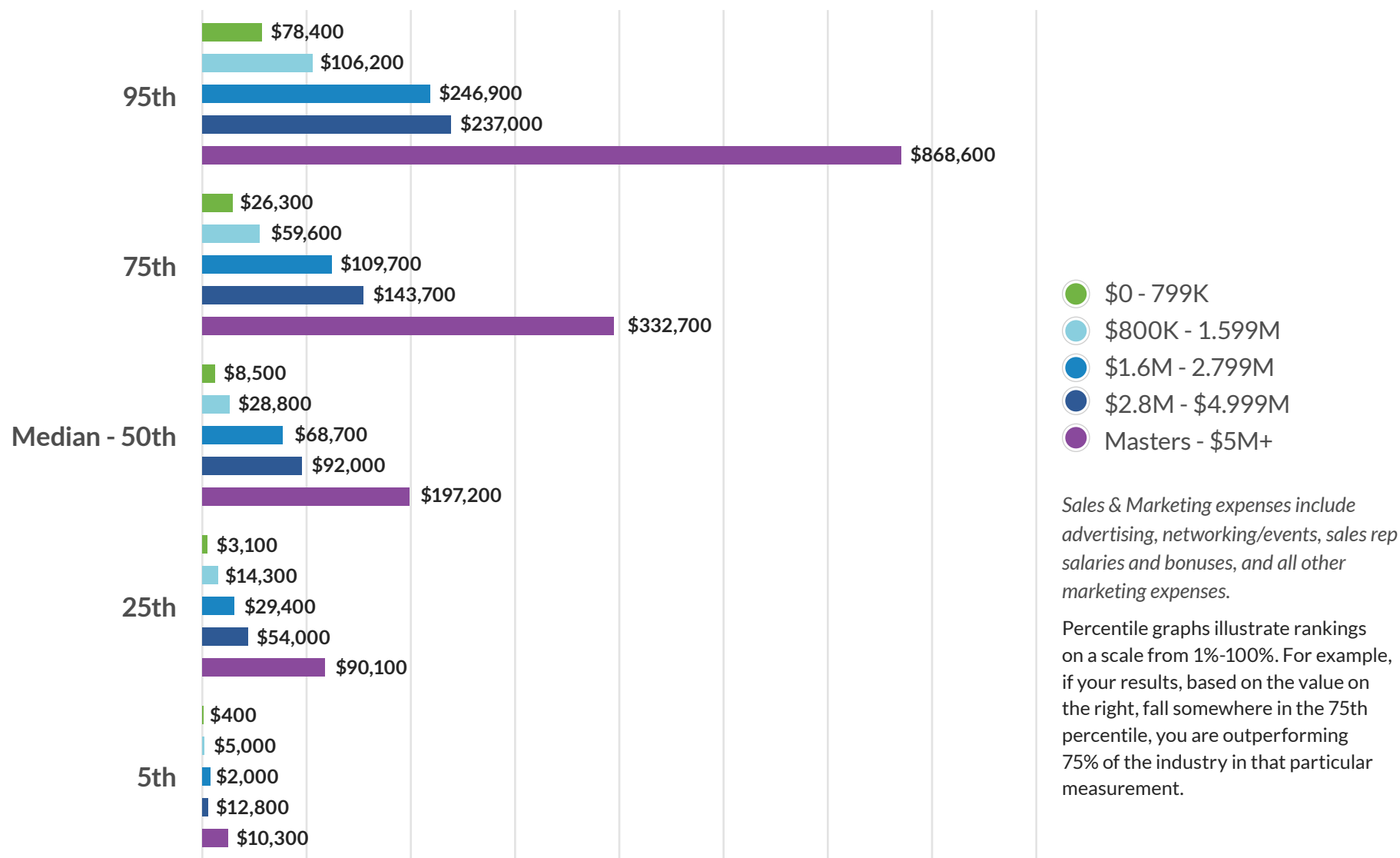
*See previous page for expense examples.

Revenue Range	\$5M+	\$2.8M-\$4.999M	\$1.6M - \$2.799M	\$800K - \$1.599M	\$0 - \$799K
Median Annual Revenue	\$7,648,000	\$3,576,000	\$2,045,000	\$1,245,000	\$450,000
Direct Care Expenses					
Caregiver wages	60.7%	52.8%	55.5%	54.8%	55.4%
Workers comp insurance	1.0%	1.0%	1.2%	1.5%	1.6%
Caregiver benefits (health, 401k, supplemental, etc.)	0.7%	0.8%	0.6%	0.8%	0.8%
Caregiver payroll taxes (employer taxes, unemployment insurance)	5.2%	5.1%	5.9%	5.6%	5.8%
Caregiver reimbursements (mileage, meals, etc.)	0.3%	0.3%	0.3%	0.4%	0.5%
Caregiver ongoing training (not initial training)	0.2%	0.2%	0.2%	0.3%	0.4%
*Other direct care expenses not listed	0.3%	0.5%	0.3%	0.7%	0.7%
Total Direct Care Expenses	68.4%	60.7%	64.1%	64.2%	65.2%
Caregiver Recruitment & Retention Expenses					
Caregiver job ads and networking	0.2%	0.3%	0.4%	0.4%	0.5%
Caregiver background checks and screenings	0.1%	0.2%	0.2%	0.1%	0.4%
Caregiver retention (bonuses, recognition program, satisfaction mgmt)	0.3%	0.3%	0.3%	0.2%	0.3%
Caregiver onboarding and initial training	0.2%	0.2%	0.2%	0.2%	0.4%
Team wages associated with recruiting and retaining caregivers	0.9%	1.4%	1.7%	2.3%	2.6%
Pre-employment assessments	0.1%	0.1%	0.1%	0.1%	0.6%
All other expenses related to recruiting and retaining caregivers	0.1%	0.1%	0.4%	0.3%	0.5%
Total Caregiver Recruitment & Retention Expenses	1.9%	2.4%	3.2%	3.6%	5.2%
Sales & Marketing Expenses					
Traditional advertising (radio, print, etc.)	0.1%	0.2%	0.3%	0.4%	0.4%
Internet advertising (Google Ads, paid ads on Facebook, etc.)	0.2%	0.3%	0.4%	0.4%	0.8%
Networking and events (community, gifts, conventions, etc.)	0.1%	0.1%	0.1%	0.2%	0.3%
Search Engine Optimization (SEO)	0.2%	0.2%	0.4%	0.3%	0.8%
Sales rep salaries	1.9%	1.9%	3.1%	2.5%	5.0%
Sales rep bonuses and perks	0.2%	0.4%	0.4%	0.4%	0.4%
Lead Generation websites (Caring.com, etc.)	0.1%	0.1%	0.1%	0.3%	0.5%
All other marketing-related expenses (consulting, etc.)	0.2%	0.4%	0.4%	0.4%	0.5%
Total Sales & Marketing Expenses	2.9%	3.6%	5.1%	4.9%	8.7%
Operating Expenses					
Rent, maintenance, and utilities	1.3%	1.5%	1.9%	2.0%	3.0%
Office support wages (admins, schedulers, HR staff, nurses)	7.3%	7.6%	7.7%	8.1%	13.9%
Executive team wages (exclude all owners)	2.9%	4.2%	3.8%	5.7%	12.3%
Scheduling software, including telephony	0.3%	0.4%	0.4%	0.5%	0.8%
Franchise royalty fees (if applicable)	4.2%	4.7%	4.4%	5.2%	4.7%
Association/membership dues (if applicable)	0.1%	0.1%	0.1%	0.2%	0.3%
Travel/meals/entertainment expenses	0.1%	0.1%	0.2%	0.2%	0.3%
*Other operating expenses (exclude owners' salary and benefits)	4.3%	3.0%	3.2%	3.5%	4.7%
Total Operating Expenses	20.5%	21.5%	21.8%	25.3%	39.8%



OTHER EXPENSES IN U.S. DOLLARS

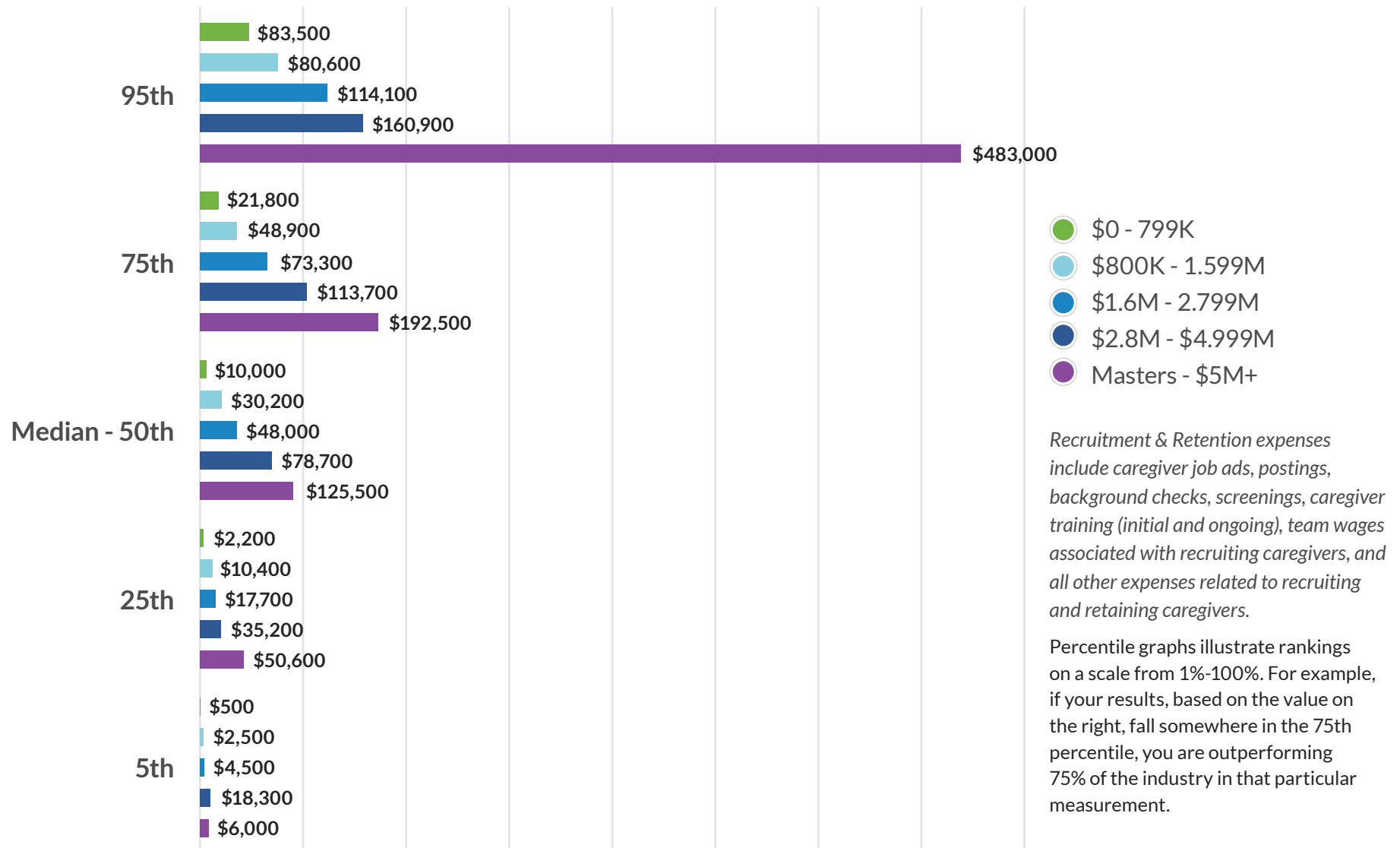
4.15 Sales & Marketing Expenses Percentile Ranking for 2020 - Revenue Ranges





OTHER EXPENSES IN U.S. DOLLARS

4.16 Recruitment & Retention Expenses Percentile Ranking for 2020 - Revenue Ranges





REVENUE GENERATED BY SERVICE OFFERINGS

4.17 Historical Revenue Generated by Service Offerings

Service Offerings	2020	2019	2018
Hourly Care	85.9%	84.4%	88.2%
Live-In Care	8.5%	8.5%	7.3%
Geriatric Care	0.4%	1.1%	0.8%
Alert Monitoring	0.4%	0.4%	0.1%
Skilled Nursing	2.0%	2.2%	1.8%
Health Care Staffing Services	1.3%	1.6%	1.0%
Medicare Home Health	0.3%	0.4%	0.1%
Other Services	1.2%	1.4%	1.0%

Survey participants were asked, "What percent of your annual revenue came from the following service offerings?"

Other Service Offerings Mentioned

- Child Care
- CNA Classes
- CPR & First Aid Training
- Errands Service
- Guardianship
- Home Health
- Handyman/Yard Work
- Meal Preparation
- Medication Management
- Non-skilled Physical Therapy
- Overnight Services
- Placement Services
- Transition Programs
- Transportation



PAYER SOURCE PERCENTAGES

4.18 Historical Payer Source Percentage of Revenue

Service Offerings	2020	2019	2018
Private Pay	65.3%	67.5%	72.1%
Long Term Care	11.7%	11.4%	11.3%
Veteran Assistance	4.9%	3.6%	3.5%
Billed Medicaid	2.5%	2.6%	1.9%
Medicare reimbursement	0.5%	0.7%	Didn't Ask
Medicare Advantage reimbursement	0.1%	0.3%	
Medicaid Waiver	8.1%	6.6%	5.2%
Workers Compensation	0.4%	0.6%	1.1%
Other Insurance	0.7%	0.6%	0.6%
Trusts/Banks	0.5%	0.9%	0.7%
Billed Hospitals Directly	0.6%	0.4%	0.2%
Area Agencies on Aging	1.6%	1.5%	1.1%
Accountable Care Organization (ACO)	0.0%	0.0%	0.1%
Managed Care Organization (MCO)	2.1%	1.7%	0.7%
Other	1.4%	1.8%	1.4%

Survey participants were asked, "What percent of your annual revenue came from the following payer sources?"

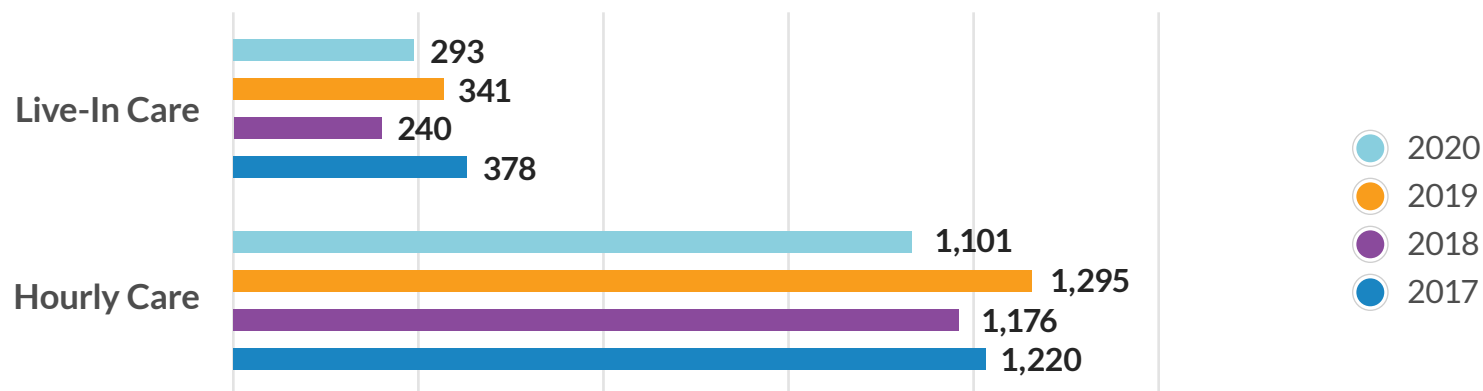
Other Payer Sources Mentioned

- Alzheimer's Association
- Charitable Organizations
- Contributions
- County Funding
- Grants
- HUD Wellness Program
- Jewish Family Services
- MS Society
- PACE Program
- Schools
- State Funding



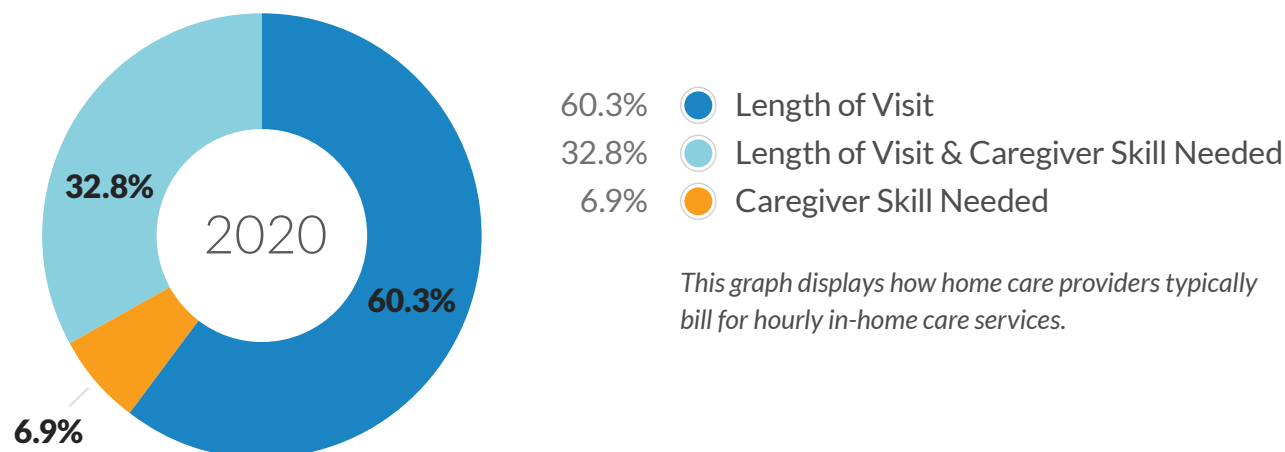
BILLING RATES

4.19 Historical Median Weekly Billable Hours



BILLING RATES

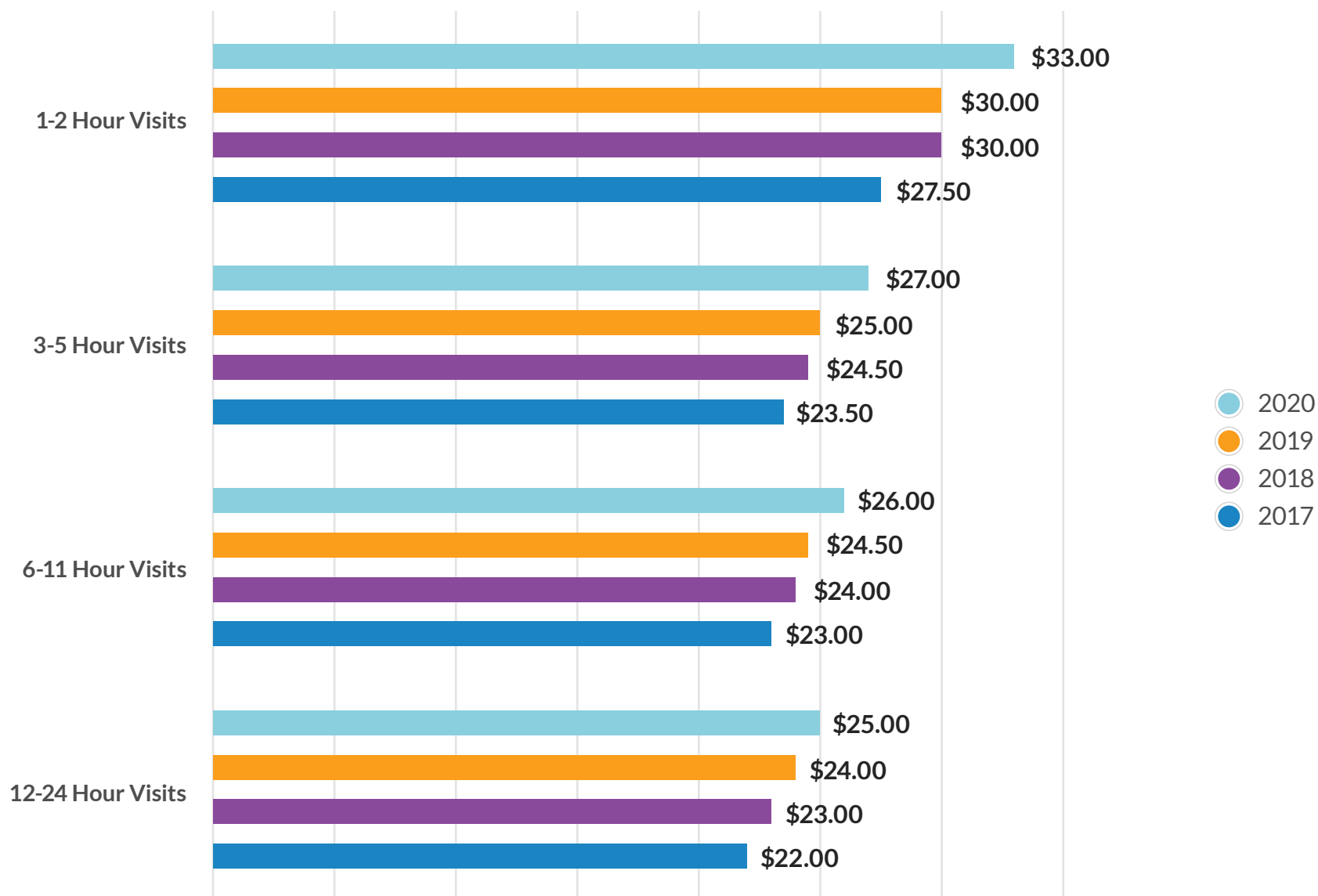
4.20 Service Billing Methods for 2020





BILLING RATES

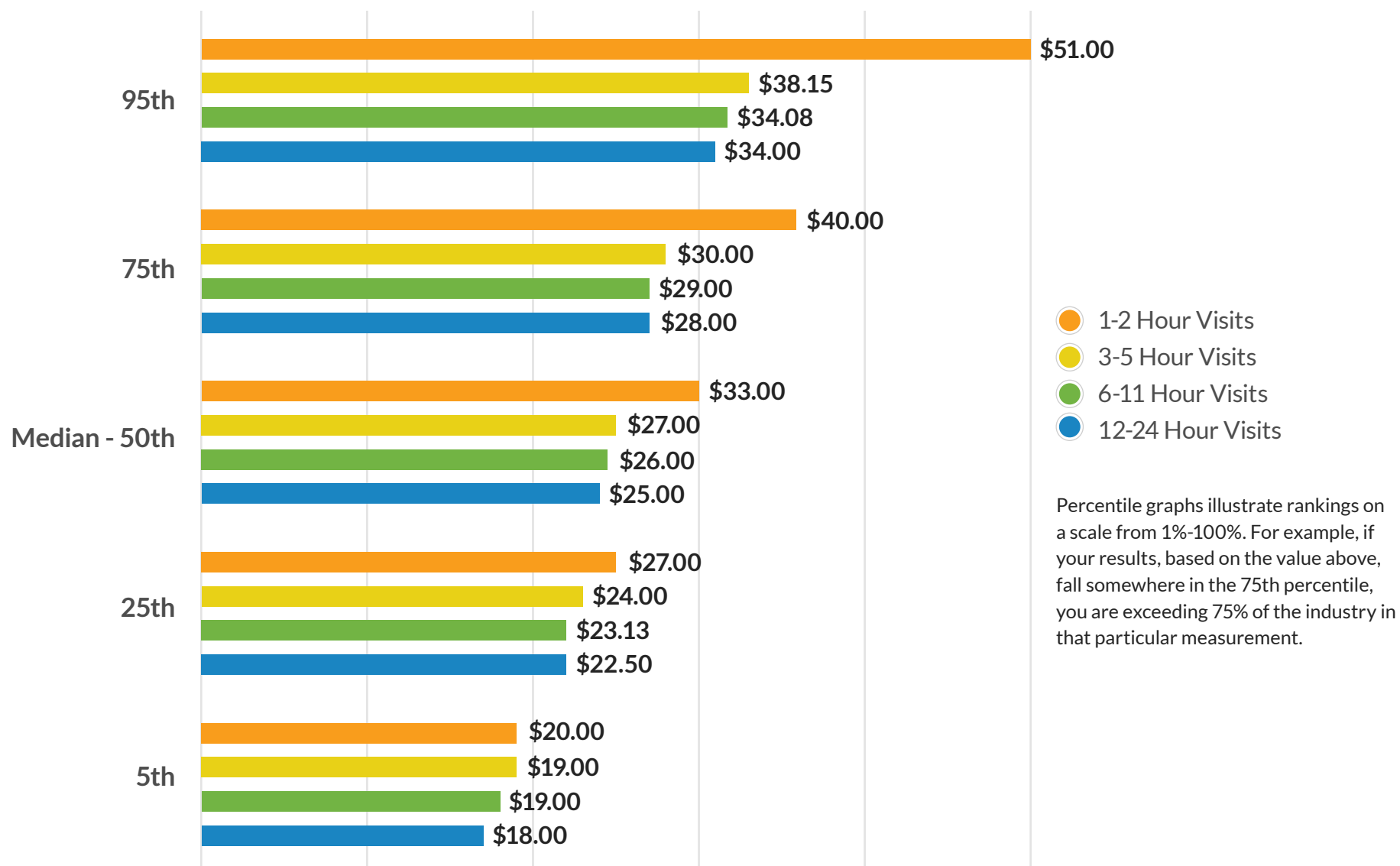
4.21 Historical Length of Visit Median Billing Rates





BILLING RATES

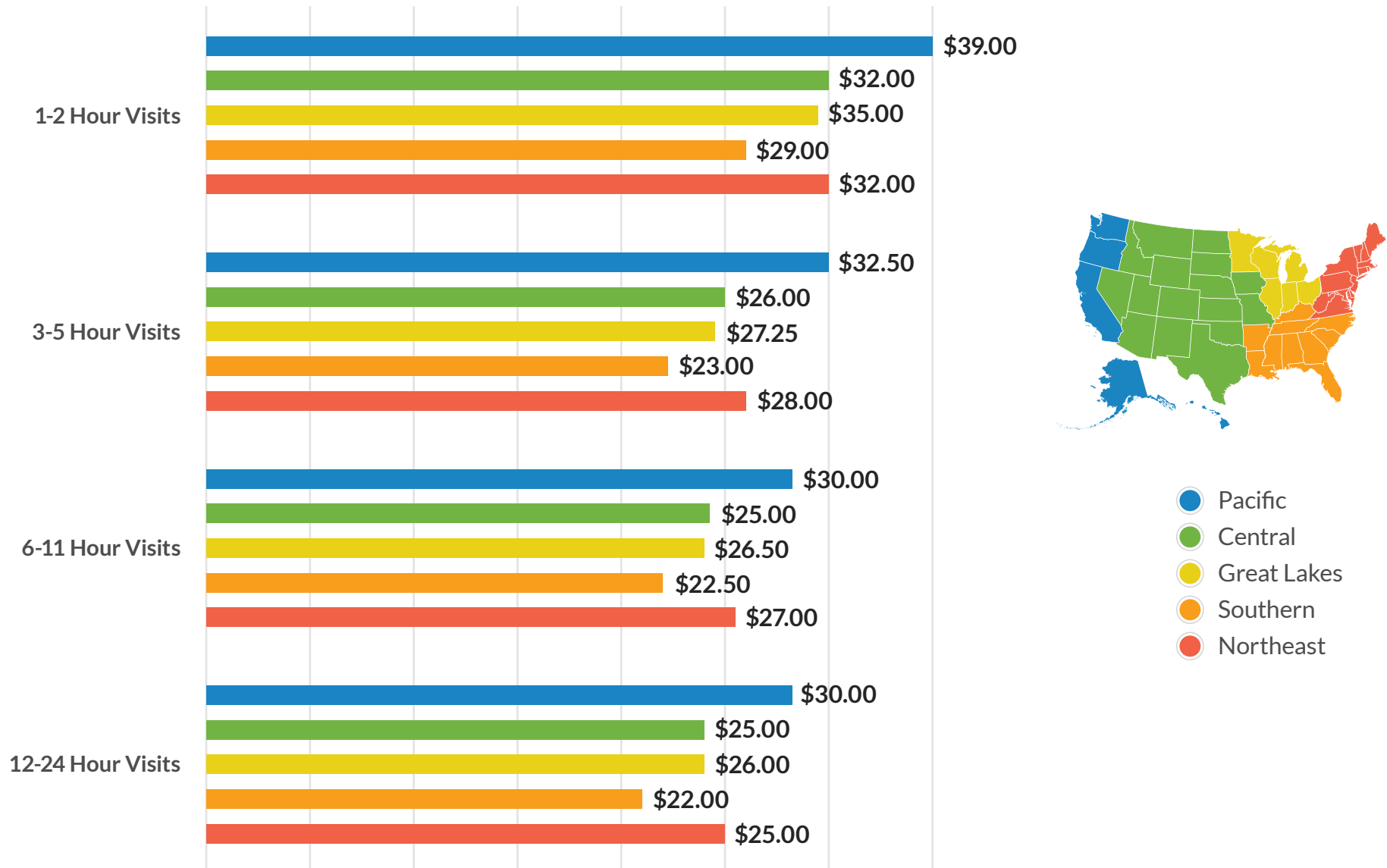
4.22 Length of Visit Median Billing Rates for 2020 - Percentile Ranking





BILLING RATES

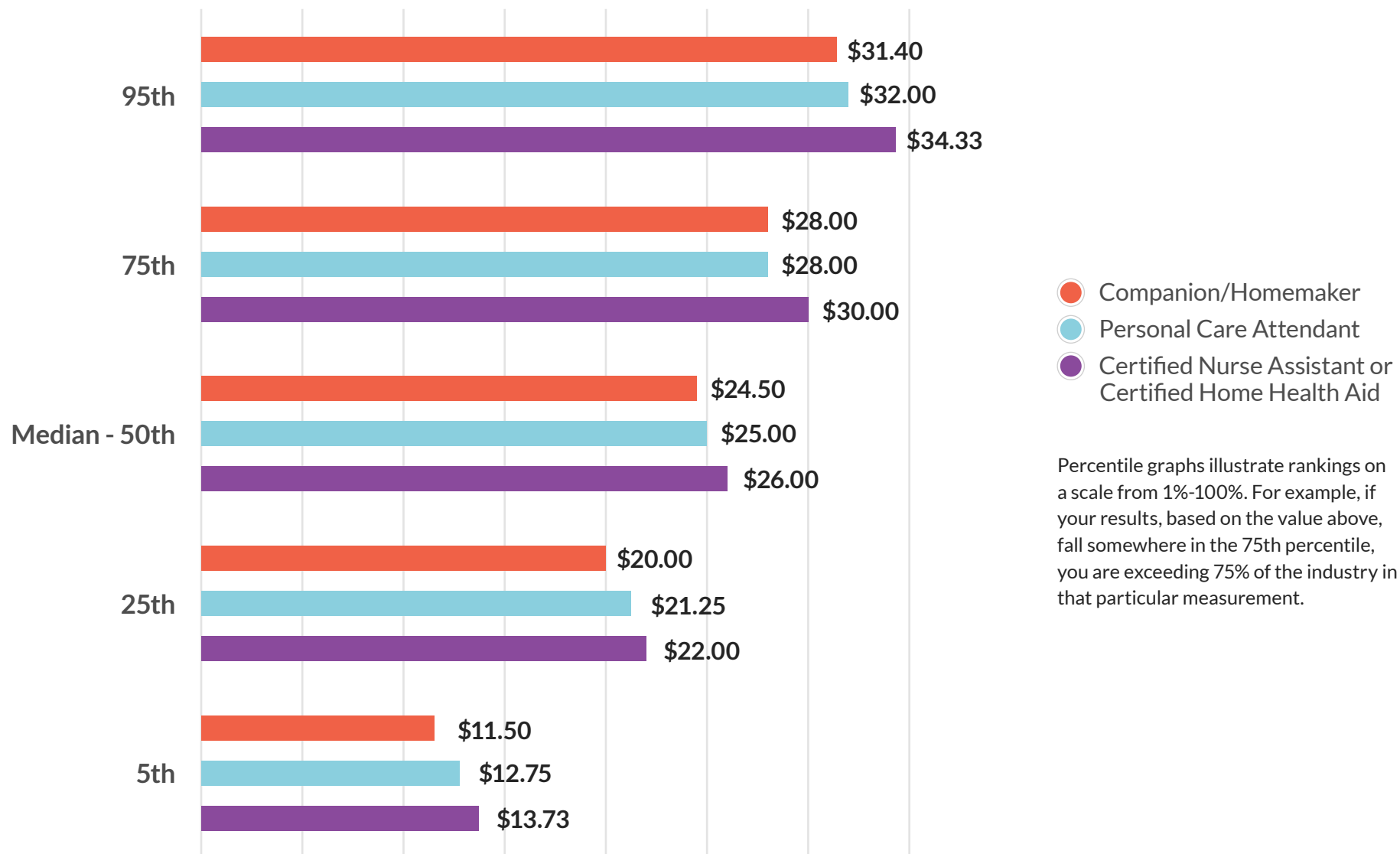
4.23 Length of Visit Median Billing Rates for 2020 - Geographic Region





BILLING RATES

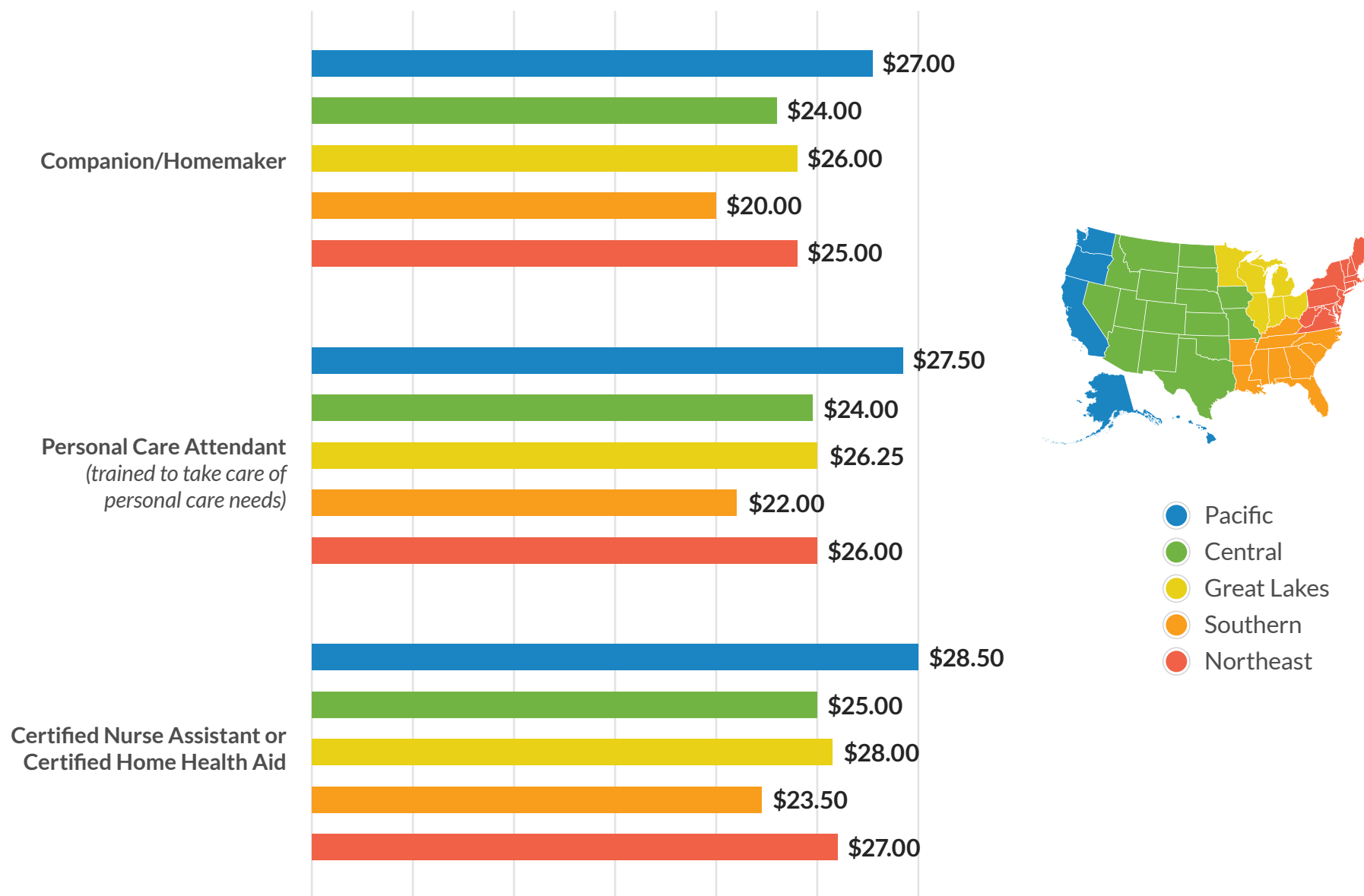
4.24 Caregiver Skill Level Billing Rates for 2020 - Percentile Ranking





BILLING RATES

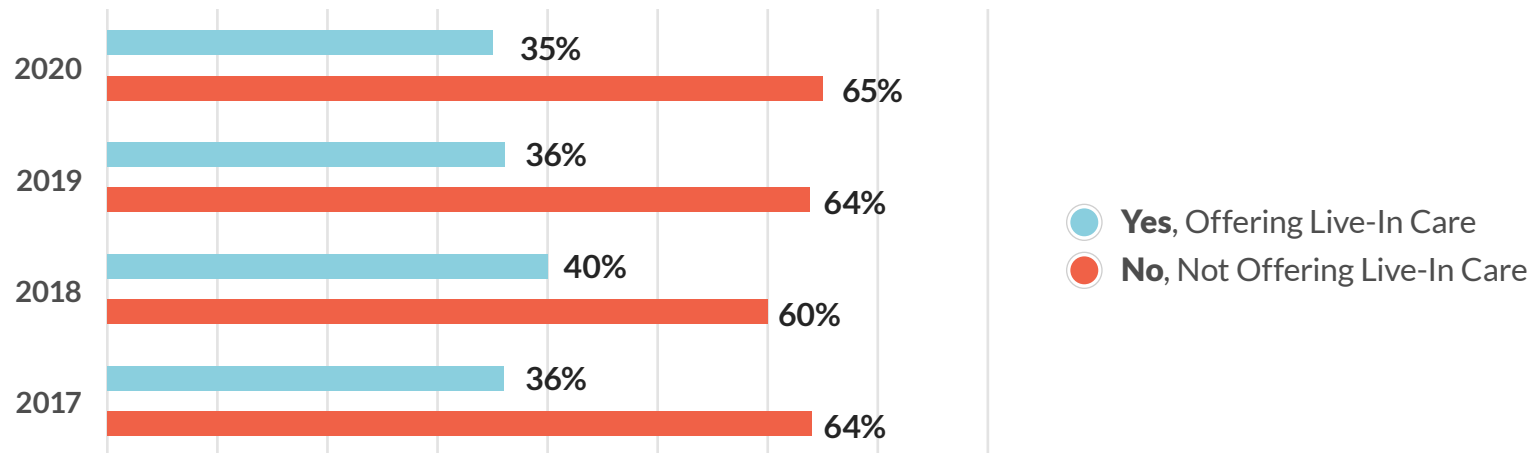
4.25 Caregiver Skill Level Billing Rates for 2020 - Geographic Region





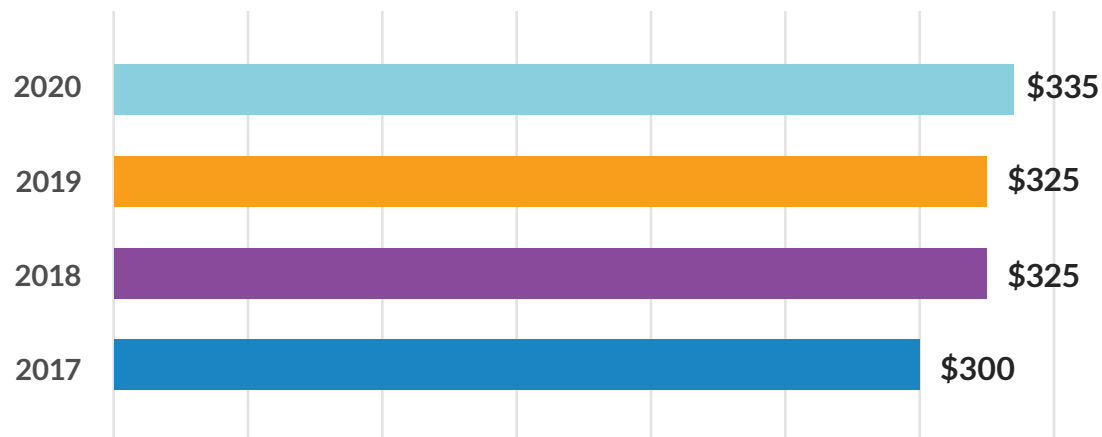
LIVE-IN CARE BILLING RATES

4.26 Historical Percent of Providers Offering Live-In Care



LIVE-IN CARE BILLING RATES

4.27 Historical Median Live-In Care Billing Rates



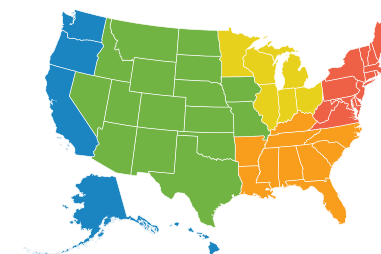
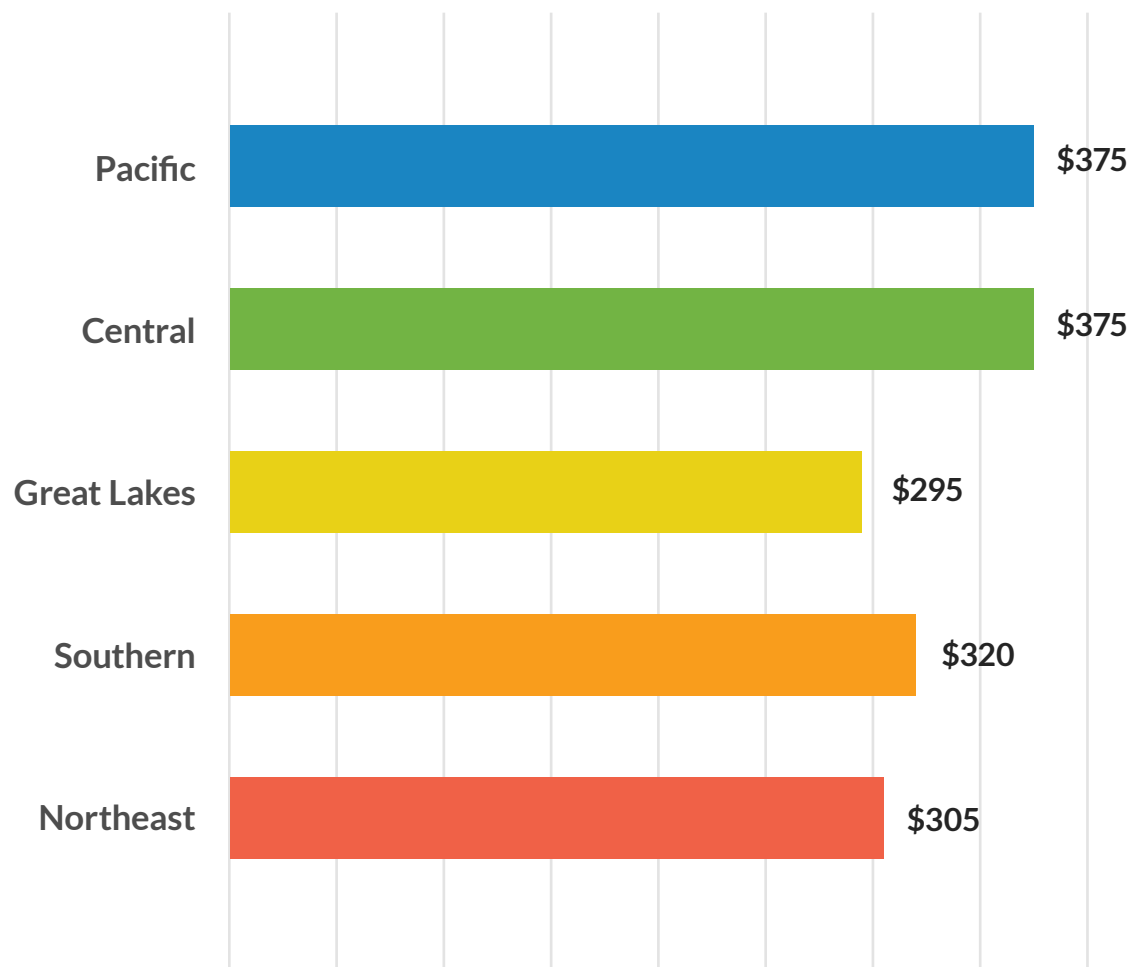
Live-in care is billed daily for 24-hour care (e.g., caregiver sleeps in the home).

Over the last four years, median live-in billing rates have increased 11.7%.



LIVE-IN CARE BILLING RATES

4.28 Median Live-In Care Billing Rates for 2020 - Geographic Region



Live-in care is billed daily for 24-hour care (e.g., caregiver sleeps in the home).



ARTICLE

Five Ways to Improve Financial Performance with Benchmarking



Stephen Tweed

Founder | The Home Care CEO Forum



“Without the data, you’re just another person with an opinion.”

- W. Edwards Deming

How was your financial performance in 2020?

The year 2020 was a crazy year for home care, with the COVID-19 crisis, political and racial disruption, and the caregiver recruiting and retention crisis. In January of 2021, we asked the members of our Home Care CEO Mastermind Groups about their year 2020 and what they planned to focus on in 2021. Our Mastermind members consist of 41 companies that range in size from \$1.5 million to \$38 million in annual revenue, and our largest group, the Top 5% Group, has ten companies that average \$15.8 million in annual revenue.

Here’s what we learned:

- 69% of our members showed a growth in annual revenue from 2019 to 2020.
- The average annual revenue increase was 14.55%.
- 23% of our members showed a decrease in revenue, and the average decrease was 12.33%.
- 8% of our members were flat in revenue from 2019 to 2020.

One of the things our members have in common is that they pay attention to the data provided by the annual Home Care Benchmarking Study from Home Care Pulse. We use the Home Care Pulse

financial report as the basis for our own internal benchmarking.

The Seven Key Numbers

If you recall from last year’s report, we have identified seven numbers that you need to watch to manage your company’s financial performance.

1. Total Revenue – This is the total number of dollars you take in from your home care and related services. As an owner or CEO, you will want to track your revenue on a weekly, monthly, and annual basis. You should be tracking your annual revenue growth year over year and comparing that to your peers in the industry.

2. Direct Cost of Care – This is the number of dollars you spend to put a caregiver into the home of a client. The expenses that are included in the direct cost of care are the following:

- Caregiver Wages
- Workers Compensation Insurance
- Caregiver Benefits (Health Insurance, etc.)
- Caregiver payroll taxes (FICA)
- Caregiver reimbursement (mileage, meals)
- Caregiver recruiting and retention
- Caregiver ongoing training
- Other direct care expenses

For the median-sized company this year, direct care expenses were 60.4% of revenue.

3. Gross Margin – This is the difference between your Total Revenue and your Direct Cost of Care. The median for this study is 39.6%. There are only



two ways to grow your gross margin: raise prices or cut costs.

4. Caregiver Recruitment and Retention Expenses –

This is the total number of dollars you spend on your job ads, background checks, onboarding and initial training, and other expenses related to recruiting and retaining caregivers. In 2019, the median sized company spent 2.5% of revenue on recruiting and retention expenses.

5. Sales and Marketing Expenses – This is the total number of dollars you spend on attracting and admitting new clients. This category includes advertising, Search Engine Optimization and social media, sales rep salaries, bonuses and benefits, and other marketing expenses. In 2019, the median sized company spent 4.4% of revenue on sales and marketing.

6. Other Operating Expenses – This category includes all of the expenses to run your office including rent and utilities, office staff wages and benefits, software and computer hardware, travel, meals, and other operating expenses (except owners' compensation). One of the big line items I always look at is office staff wages and benefits. In 2019, Other Operating Expenses totaled 22.6% for franchises and 17.6% for independents. The difference here is that the typical franchise home care company paid 5% franchise royalty fee to their franchisor. This is included in the Other Operating Expenses category.



7. Net Income from Operations Before Owner's Compensation –

This reflects the bottom line of your business before your own compensation and benefits. We use this number because there are so many ways for business owners to legitimately take money out of their businesses. In the 2020 report, we find the net income from operations to be 10.1% for franchises and 15.1% for independents. (The difference is the median 5% franchise royalty fees paid by franchisees to franchisors.)

This net-income number also gets you close to your agency's EBITDA: Earnings before interest, taxes, depreciation, and amortization. In the home care industry, the value of a company for use in buying or selling the company is based on a multiple of adjusted EBITDA.

Five Ways to Improve Financial Performance with Benchmarking

1. Grow Your Top Line Revenue

The simplest way to grow your agency's bottom line is to keep your expenses steady and grow your top line. Top-line revenue in home care is directly connected to hours per week of care provided. There are two ways to grow your top-line revenue: increase hours per week or raise your price per hour.

The leading companies in our industry have clearly defined systems for marketing their services and for selling their services to high potential referral sources and high net-worth clients.

Raising your price per hour is a function of the position your agency holds in the mind of clients, families, and referral sources. Are you providing enough added value to your clients to earn that additional price? In our Home Care CEO Mastermind Groups, we've had in-depth discussion on the concept of "The 70th percentile." The concept is to provide such value that you can position your agency to charge premium prices. Then you can afford to pay your caregiver at the 70th percentile of your local marketplace.

2. Increase your Gross Margin

Gross margin is your top-line revenue minus your direct cost of care. To improve gross margin, there are two things you can do; increase prices or reduce caregiver compensation and benefits. Since we are dealing with the caregiver recruiting and retention crisis, reducing pay or benefits is very difficult. That means you need to make sure your prices are enough to cover your direct cost of care and give you the gross margin you want.

One "Rule of Thumb" we have learned over the years is that your bill rate to clients' needs to be double your pay rate to caregivers. If you pay caregivers \$12.00 per hour, you need to bill clients \$24.00 per hour to earn near a 40% gross margin.

3. Reduce Caregiver Turnover

One of the ways to improve gross margin is to reduce caregiver turnover, and therefore reduce the amount of overtime you need to pay to meet the growing needs of your clients and referral sources. Data from previous Home Care Benchmarking Studies shows us that about 80% of turnover happens in the first 90 days. Understanding the causes of 90-day turnover can help you keep those caregivers longer. These are three things we are focusing on for 90-day retention:

- Improving your selection system to hire higher-quality applicants.
- Matching requested hours with actual hours worked so that caregivers' paychecks are enough to meet their financial needs.
- Engaging caregivers to help them feel like they are part of your agency family.

4. Improve Operational Productivity

You can reduce your costs of office team compensation and benefits by designing systems to increase your office team productivity. We've observed that the leaders of top tier home care companies are systems thinkers. They



look for ways to systematize tasks that are repeated frequently. In studying operational productivity, we've identified twelve systems for effective agency operations:

- Sales System
- Marketing System
- Inquiry System
- Recruiting System
- Compliance System
- Retention System
- Scheduling System
- Care Coordination System
- Payroll System
- Billing & Collection Systems
- Metrics Tracking
- Financial Reporting

Systems involve processes and people and making tasks consistently repeatable. Using technology to automate these systems can make your team members dramatically more productive, and you can operate a larger company with fewer people. One of the benchmarks we look at is average revenue per full-time office team members. We see that the larger the company, the larger the revenue per FTE.

5. Match Your Expenses to Industry Benchmarks

You can reduce costs and grow your bottom line by making sure your operating expenses are in line with industry benchmarks. Many of our top tier agency owners have adopted this benchmarking study as a guideline for building budgets and managing expenses. There are several areas that our larger companies compare their performance to the benchmarks:

- Direct Cost of Care
- Recruiting and Retention Expenses
- Sales and Marketing Expenses
- Office team compensation and benefits
- Non-owner executive compensation and benefits

Study the Benchmarks and Compare Your Own Data

It is very clear to us that the largest, fastest growing, and most profitable home care companies are led by owners and CEOs who understand their financial performance, who have clear metrics for measuring performance, and who can discuss with their peers ways to improve growth and increase profitability. These are leaders who use the benchmarking data to help understand how their business is doing. You can too! 🏠

ABOUT THE AUTHOR

*Stephen Tweed 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**. In 2019 he received the first annual Home Care Industry Leadership Award from the Home Care Association of America. He can be reached at www.homecareCEO.com or www.caregiverquality.com*





ARTICLE

The Strategy for Value Creation

Optimizing Inorganic Growth Within the Home Care Industry Through Systematic Health Care M+A



Jonathan Henderson

Shareholder, Practice Chair | **Polsinelli**



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Shareholder, Practice Co-Chair | **Polsinelli**



Madeleine Kline

Associate | **Polsinelli**

The home care industry is continuing its consolidation trend. Home health, home care, and hospice agencies (collectively “home-based care” agencies) with enterprise values less than \$10 million are increasingly pursued as attractive acquisition candidates by a variety of prospective acquirers. Over the past several years, private equity funds, large health care and home-based care providers, healthcare insurers, and other payer models have completed hundreds of home-based care agency acquisitions. In fact, home-based care transactions reached a national high in 2020 with a recorded deal count of over 240 and an aggregate deal value of over \$13 billion. While opportunities to transact had previously been reserved primarily for larger home-based care agencies with multi-state footprints, large work forces and higher revenues and EBITDA, the recent proliferation of smaller-sized deals is helping contribute to acquirers’ increased earnings and market share and other benefits of inorganic growth.

The acquirers and sellers who are driving the overall growth and value creation through these lower middle market home-based care acquisitions are utilizing a programmatic mergers and acquisitions strategy. A programmatic mergers and acquisitions strategy is the concept that companies strategically and repetitively executing a high volume of smaller deals tend to

create more value over time than companies that only occasionally complete a large acquisition. Indeed, evidence shows that programmatic acquirers consistently outperform their peers in terms of overall growth and value generation⁴ when compared to occasional, high-profile mega-deals. This sustainable growth pattern continues even when businesses are rocked by recessions, a global pandemic, or more routine societal and economic downturns. We use the label “Systematic Health Care M+A” to describe the programmatic processes and systems through which acquirers are executing on their acquisitions of lower middle market health care businesses, including home-based care agencies.

There are keys to successfully implementing Systematic Health Care M+A on the acquirer’s side and being identified as an acquisition target on the seller’s side.⁵ Acquirers who engage in Systematic Health Care M+A are more likely to use strategic, specific practices at each stage of the acquisition process, and also as a means of maintaining what is known as the “M&A operating model.” The result is an efficient and consistent process that allows acquirers to identify ideal and practical acquisitions with efficiency and streamline their acquisition processes.

Sellers also benefit from the use of this process-oriented approach which creates cost efficiencies that make smaller deals with smaller home-based



agencies more feasible to complete than in the past. The rise of serial acquirers within the home-based care market is opening previously closed doors to transact for smaller home-based care agencies who may not have previously had a viable succession strategy or exit plan. As the industry increasingly focuses on building and expanding national provider platforms capable of furnishing services across the full spectrum of home-based care, a plethora of options now exist for well-run, smaller agencies. For instance, some acquirers want to expand into a complementary service line or gain access to a care delivery program, obtain a new license type, or expand into a new territory. In regard to ownership, some acquirers target owner-operators who are interested in selling a portion of the ownership of their business and continuing on for a set period of time or even permanently, while others are seeking a complete and immediate buy out. The variety available makes the lower middle market even more attractive to acquirers, and smaller home-based care agencies are receiving more attention in the deal marketplace than ever before, as they carry more intrinsic value to acquirers than they may realize.

An established systematic process saves both sides of an acquisition time and money by equipping both sellers and acquirers with goal-oriented strategies and criteria that are specifically tailored to their business. This article explores those strategies and the other key components of the programmatic mergers and acquisitions model being employed by savvy acquirers in consolidating middle market home-based care businesses and the steps a home-based agency may use to maximize the opportunity to transact with those acquirers.

Strategy and Sourcing

The first stage of the Systematic Health Care M+A approach involves developing a strategy for identifying deals and sourcing them appropriately and efficiently. Acquirers identify and utilize a defined set of criteria with a clear link to strategic objectives. This stage is an

important part of the process because it allows acquirers to identify the most effective ways to strategically expand for value creation. In identifying such criteria and strategic objectives at this stage, acquirers may consider various factors impacting the enterprise value of the organization and attractiveness to a future investor, such as synergies with their existing operations, unique capabilities of the target's management team and clinical workforce, access to new payors or improved reimbursement rates, or improved positioning relative to existing competitors. Acquirers also consider the various limitations of pursuing certain deals, which allows them to avoid acquisitions that could negatively impact future value creation and opportunities for an exit transaction.

At this stage, programmatic acquirers also identify an organizational model that complies with applicable regulatory restrictions and is repeatable for effectiveness and scale while also being adaptable to the specific circumstances that a given acquisition and overall growth plans might present. This is an important exercise for acquirers because it allows them to easily eliminate potential acquisitions that are not compatible organizationally with their predefined strategic objectives. Important considerations at this stage include regulatory restrictions, licensure and certificate of need requirements, application of fraud and abuse laws, fee-splitting and other prohibitions that restrict who may own, refer to and from, pay compensation to and in what amounts, or employ or control the practices of licensed home-based care providers.

Programmatic acquirers also analyze growth opportunities to scale the new business, analyze the interrelationship between the target and existing service lines and the accretive impact of combining the same, and consider operational synergies not reflected in the book value of the transaction. For example, acquirers spend time early in this initial phase of a deal understanding the seller's business and confirming that the services and programs offered align with the care delivery the acquirer provides to patients. This allows acquirers to

identify target companies that offer services which fit within the care continuum of the acquirer's other health services offerings, and highlights differences, such as contrasting payment models that might make the ultimate integration of the two companies practically impossible. By conducting a meaningful analysis of these factors at the early stages, acquirers are able to quickly identify and distinguish viable opportunities from discordant ones and focus their efforts accordingly.

Sellers similarly benefit from establishing specific goals and identifying potential acquirers at this stage. Considering market trends and operational alignment with other types of health care businesses allows sellers to value their business in ways that extend beyond mere revenue. Having conversations and exploratory meetings with prospective acquirers early and often allows sellers to identify what acquirers are looking for in an acquisition and how to best position themselves for sale based on what is most attractive about their business in the eyes of prospective acquirers. This not only allows sellers to focus on the aspects of their businesses that differentiate them from other similar businesses, but it also ultimately makes discussions with potential acquirers more productive and affords the sellers an opportunity to contemplate the best and most effective exit strategy.

In preparing for sale, sellers should consider what they can do to make their business attractive to potential acquirers from a practical standpoint. Implementing transparent and detailed policies and strategies for all facets of the business which allow the business to run efficiently and compliantly will be just as enticing to potential acquirers as the business itself.

Sellers should also contemplate not only what they want the future of their business to look like, but also what they want their roles to be with the business going forward. Whether it's remaining an active part of the business or exiting the business entirely, sellers should have a plan for clearly communicating their intended goals and practical plans to both their employees and the acquirer and should



take time to consider the impact to their current staff and how best to effectuate a smooth transition. Considering the best ways to implement these strategies greatly benefits sellers at both the diligence and integration phases of the M&A operating model.

Diligence and Deal Execution

After identifying target companies that meet their strategic, sourcing, and organizational goals, programmatic acquirers engage in an intentional, structured due diligence process to determine whether the target company is an optimal acquisition. A streamlined, efficient due diligence process is important for both sellers and acquirers to ensure that neither party is distracted or burdened by unnecessary diligence review, which can slow the transaction down or throw it off-course entirely.

Systematic acquirers at this stage are deliberate in employing strategies that gather relevant information about revenue, cost efficiencies, integration, and cultural and organizational fit. For instance, systematic acquirers typically begin their diligence process by utilizing a checklist of universal diligence items to collect from the

seller, and issuing narrowly tailored, targeted, industry specific diligence requests that prevent diligence from being overly burdensome, but that identify information about the services or products that allows the acquirer to better understand if the target will be an accretive acquisition and further their goals. To obtain such information, acquirers employ an appropriately sized diligence team that have clearly defined roles and responsibilities. Acquirers also often utilize template agreements which are designed to fit the majority of deals, but which can also be tailored for specific acquisition fact patterns. Acquirers have set timelines and phased milestones for each stage in the diligence process, such as for document review, the aggregating of diligence responses, and reporting on the results of their due diligence findings to key stakeholders. Acquirers with the most mature processes at this stage will also organize the target's due diligence information in operations and in preparing for future transactions.

At this stage of the M&A operating model, sellers can expect to receive a rapid influx of diligence requests from quality of earnings, legal, insurance, employee benefits and other due diligence vendors engaged by the acquirer, and can best prepare for the diligence process

by collecting as many relevant company documents as possible, including contracts with third parties (from staffing contracts to advertising contracts), the financials of the business, loans and other debt documents, organizational documents, employment agreements and company handbooks and policies, and licenses and governmental and commercial payor enrollments and contracts. In responding to diligence requests, sellers should prioritize transparency and expediency, and benefit from employing experienced counsel to guide them through the diligence process.

Integration

The integration stage of the merger and acquisition process is arguably the most important for programmatic acquirers. At this stage, acquirers consider corporate culture and organizational health, and spend time aligning people, getting buy-in from employees of the new and existing companies, developing and implementing compliance policies and practices, coordinating the operations of both companies, and developing measurements and criteria for success of the acquired company. This is important to acquirers because it identifies issues that might arise after the closing that could cause problems for the business, and it allows the integration of the target company in a way that maximizes the alignment of the target company's service offerings with the acquirer's overall care delivery model in a manner consistent with the goals and objectives identified in the first stage of the M&A operating model. In order to execute a successful integration, programmatic acquirers often develop their corporate departments to prepare their employees for the continued growth of the company (i.e., providing a playbook). This has the benefit of maintaining employee morale and setting the stage for future acquisitions.

Sellers at this stage employ the integration strategies considered in the first stage of the M&A operating model,





which often include clearly communicating expectations with their employees, being open to suggestions, concerns and criticism, and assisting the acquirer with incorporating their employees and business strategies into the new company.

Conclusion

Middle market deals make up an increasing share of home-based care business mergers and acquisitions, and the acquirers who are most successful in creating value through executing these deals are those applying Systematic Health Care M+A with defined processes and systems in place at each distinct stage of the merger and acquisition life cycle. The habits and practices of programmatic acquirers are more relevant than ever and provide a reliable and effective approach to addressing various issues and considerations throughout the entirety of the acquisition process. Establishing these habits and practices early on allows both acquirers and sellers to position their businesses for either growth or sale by identifying the best growth pathway or exit strategy, preparing for the diligence process through disciplined and transparent strategies, and integrating their employees in a meaningful and efficient way. These habits and practices also enable sellers to focus on issues like compliance and maximizing their enterprise value and allows acquirers to develop a consistent process for each stage of the merger and acquisition life cycle with an eye towards strategy and predictability, thus streamlining the merger and acquisition process in the future. These acquirers intentionally engage in Systematic Health Care M+A to establish a valuable, consistent and repeatable approach for managing their middle market home-based care business merger and acquisition activity and expanding their care continuum—a trend that will accelerate redefining the future of health care by encouraging innovation and ultimately enhancing patient care. 🏠

ABOUT THE AUTHORS

*Jon Henderson is the **Shareholder & Practice Chair at Polsinelli**. He designs, implements and closes deals in the health care services industry by taking into account not only traditional corporate and structuring considerations, but also the additional layers of licensure, provider enrollment and other regulatory specific considerations that are part of executing regional and national transactions in the highly regulated health care industry.*

*Angelo Spinola is the **Shareholder & Practice Co-Chair at Polsinelli**. With two decades of legal experience, Angelo Spinola's practice focuses on employment litigation with a special interest in the home health, home care and hospice industry. Bringing a wide breadth of knowledge across the health care spectrum, he works with an array of home-based care clients, including Fortune 500 organizations and franchisors, small-owned businesses and franchisees across multiple industries.*

*Madeleine Kline is an **Associate at Polsinelli** in the Corporate and Transactional group in Dallas. She is committed to understanding the industry in which each client operates. Clients rely on her to analyze each corporate transaction matter to develop strategic solutions for their immediate and long-term business and operational goals. Working closely with seasoned Polsinelli attorneys in the Corporate and Transactional practice, Madeleine counsels clients in all aspects of the life cycle of the client's business, from selecting the appropriate choice of entity to exit strategy.*

ABOUT POLSINELLI

Polsinelli is an Am Law 100 firm with 900 attorneys in 21 offices nationwide. Recognized by legal research firm BTI Consulting as one of the top firms for excellent client service and client relationships, the firm's attorneys provide value through practical legal counsel infused with business insight, and focus on health care, financial services, real estate, intellectual property, middle-market corporate, labor and employment and business litigation.

Polsinelli strives to align its services to its clients' business goals. Doing so has allowed them to attract experienced attorneys across the country seeking a platform best suited to its clients' priorities. With the firm's concentration of presence in lower-overhead markets, its are able to offer more comprehensive services than local or regional firms and more competitive overall cost than national firms concentrated in higher cost markets.

Operations

Section Contents

- 117** Service Offerings
- 120** Client Turnover Rates
- 122** Client Average Length of Service
- 123** Client Average Lifetime Value
- 124** Readmission Rates
- 125** Sales per Full-Time Employee
- 127** Weekly Billable Hours
- 128** Staffing Summary
- 130** Top Threats
- 130** Office Staff Turnover
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- 134** COVID-19 Impact Report
- 141** *Successfully Operating and Thriving through COVID-19*
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Executive Summary

Sales & Marketing

Recruitment & Retention

Finance

Operations

Technology

Client/Caregiver Experience

Best of Home Care



SUMMARY

OPERATIONS

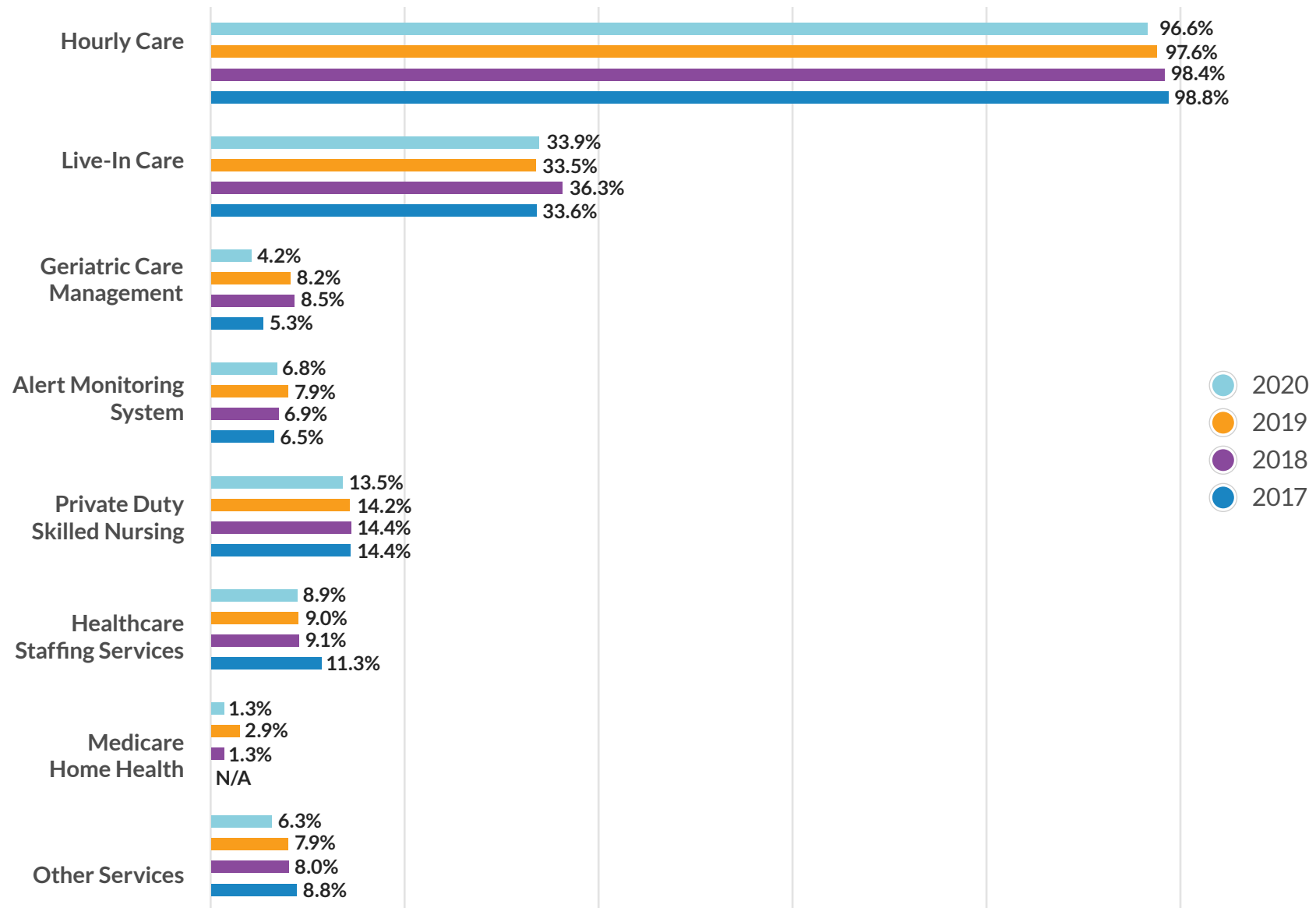
The Operations section of the 2021 Benchmarking Study provides information about topics like client turnover rates, staffing summaries, and annual salaries for staff members. It is useful in making decisions related to the internal management of your home care agency. This section also contains data points measuring the impact of the COVID-19 pandemic on agency operations.





SERVICE OFFERINGS

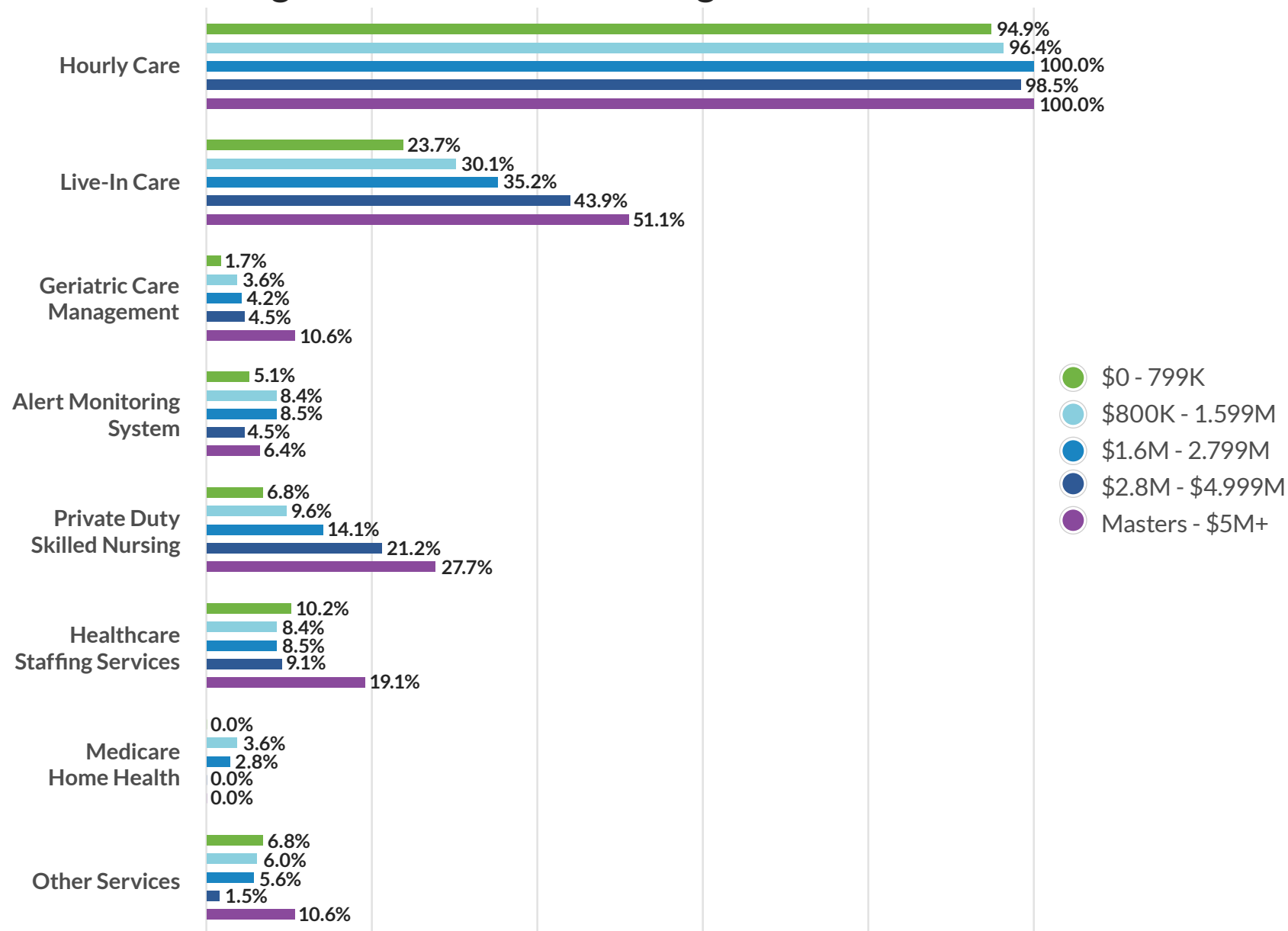
5.1 Historical Service Offerings - Overall





SERVICE OFFERINGS

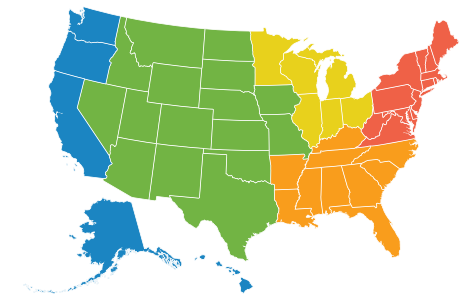
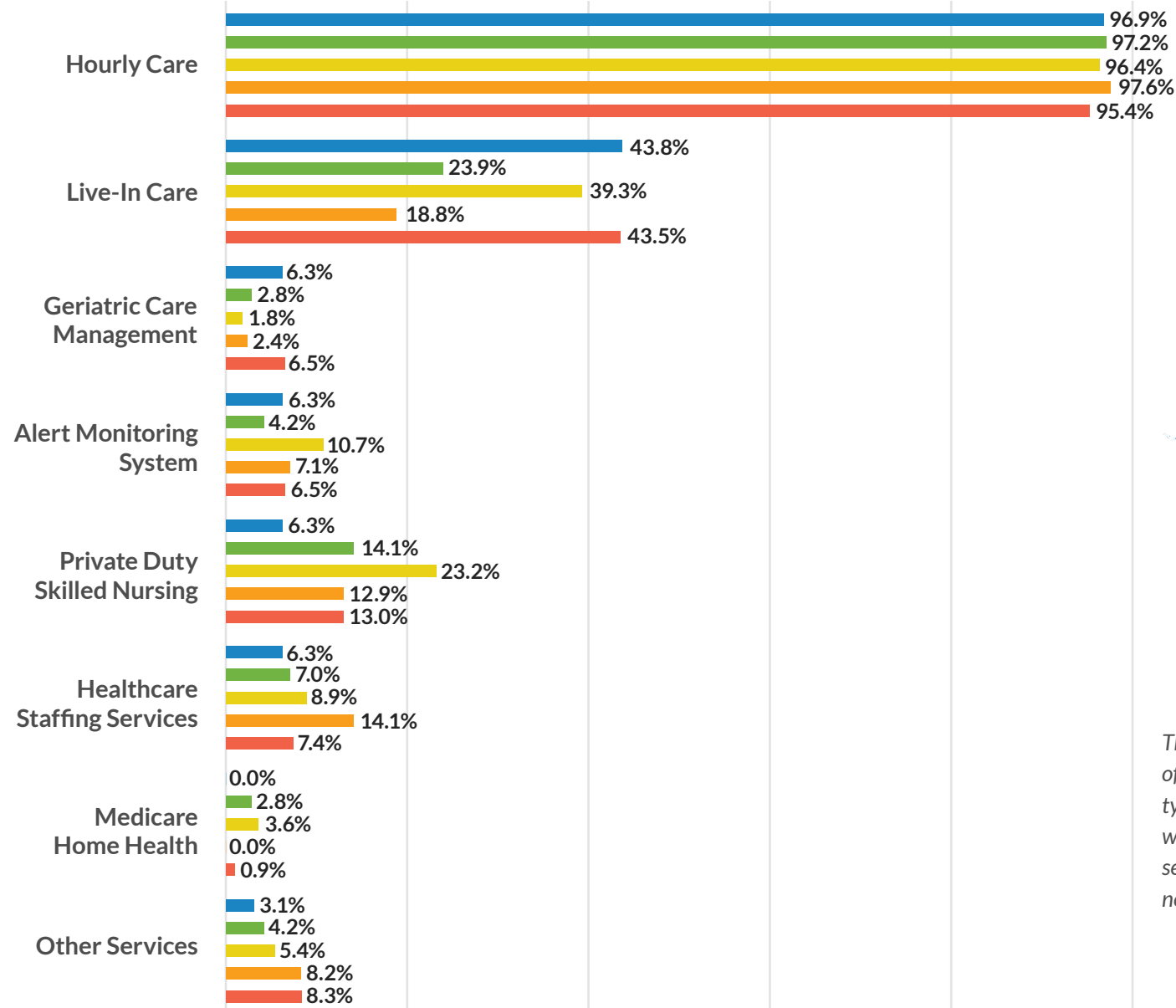
5.2 Service Offerings for 2020 - Revenue Ranges





SERVICE OFFERINGS

5.3 Service Offerings for 2020 - Geographic Regions



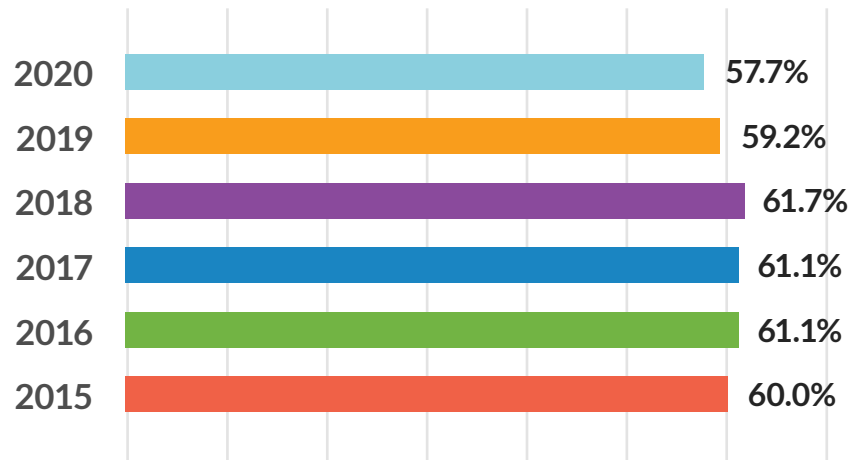
- Pacific
- Central
- Great Lakes
- Southern
- Northeast

This graph represents the percentages of providers who reported offering each type of care in 2020. Because providers were given the option to list multiple service offerings, these percentages do not need to add up to 100%.



CLIENT TURNOVER RATES

5.4 Historical Client Turnover Rate



Client Turnover Calculation

A provider has to be in business for one full-calendar year to be included in the turnover calculations. Basic client turnover is calculated by taking the **number of clients who stopped services** in 2020 and dividing it by the **average number of clients serviced** in 2020.

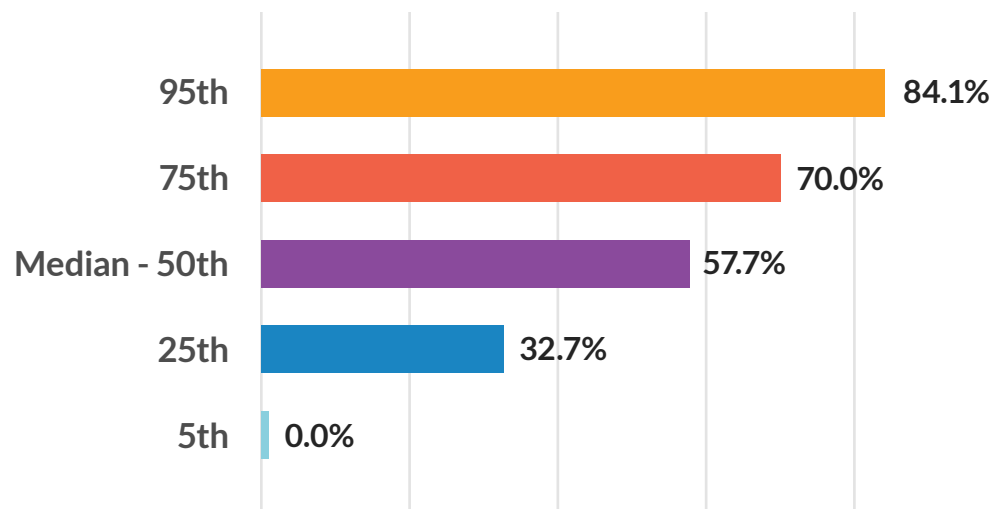
$$\frac{\text{\# of Clients Stopped Services}}{\text{Avg. \# of Clients Serviced*}} = \text{Client Turnover Rate}$$

*To calculate your average number of clients serviced during a year, take the sum of the number of clients serviced at the end of one year (e.g. Dec. 2019) and at the end of the next year (e.g. Dec. 2020) and divide that number by 2.

of clients serviced (Dec. 2019) + # of clients serviced (Dec. 2020) ÷ 2 = Avg. # of Clients Serviced

CLIENT TURNOVER RATES

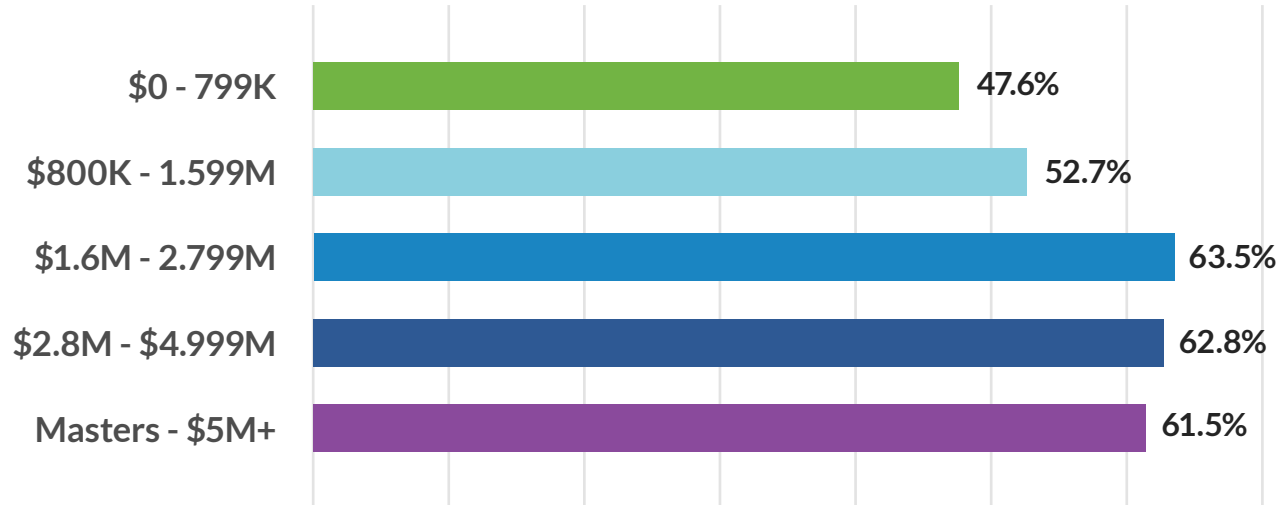
5.5 Client Turnover Rate for 2020 - Percentile Ranking





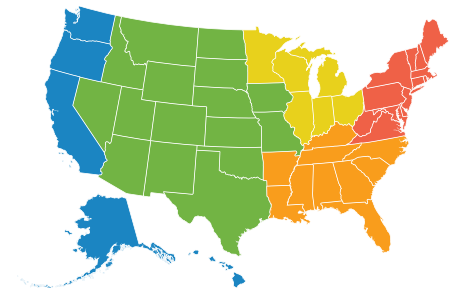
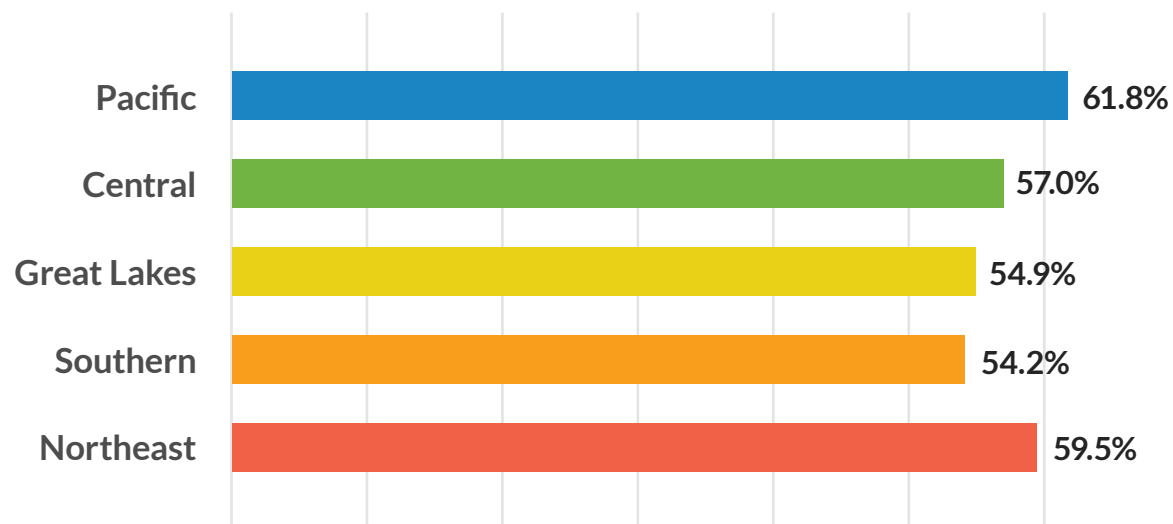
CLIENT TURNOVER RATES

5.6 Client Turnover Rate for 2020 - Revenue Ranges



CLIENT TURNOVER RATES

5.7 Client Turnover Rate for 2020 - Geographic Region

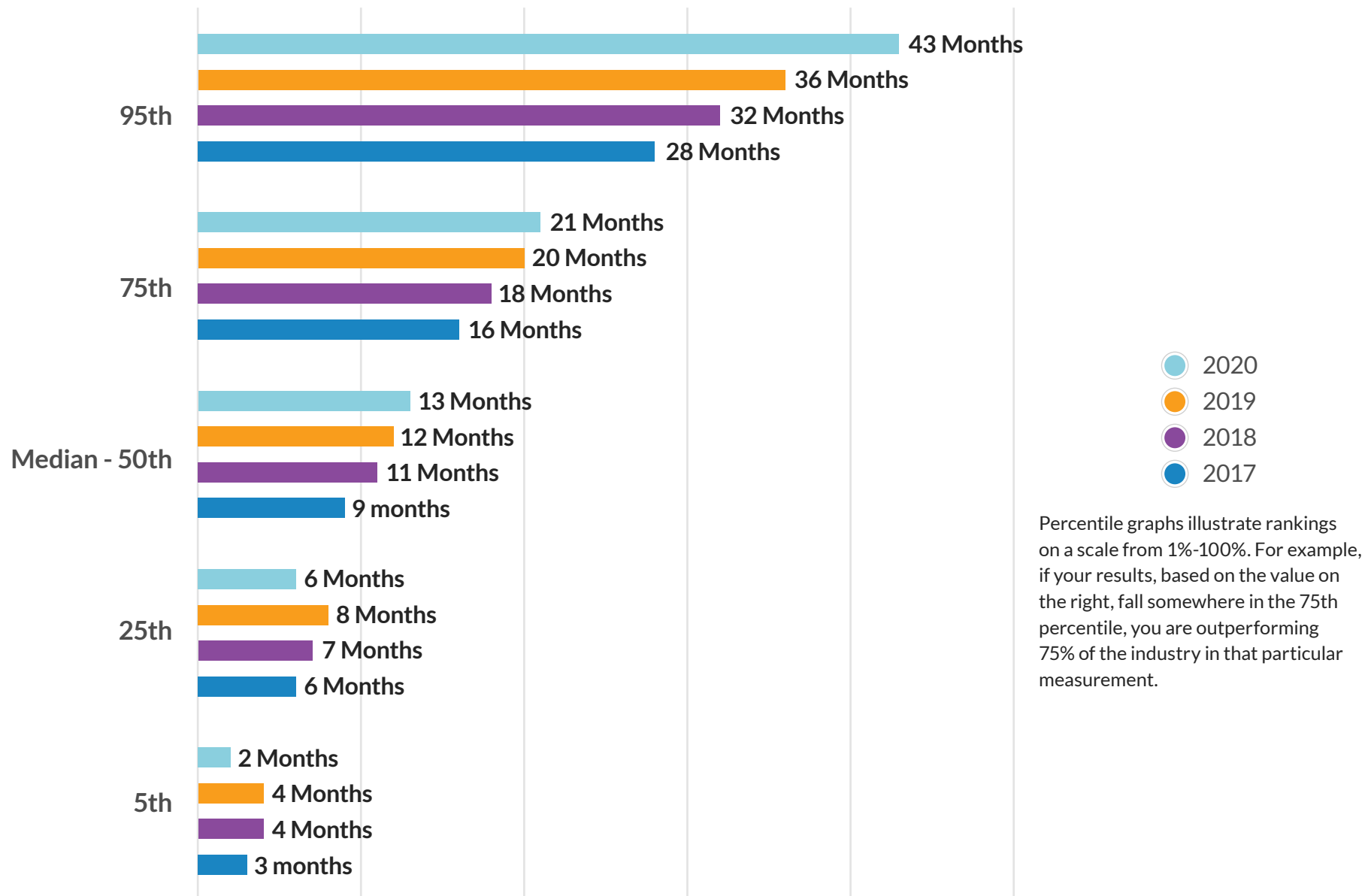


See **page 120** for Client Turnover Calculation.



CLIENT AVERAGE LENGTH OF SERVICE

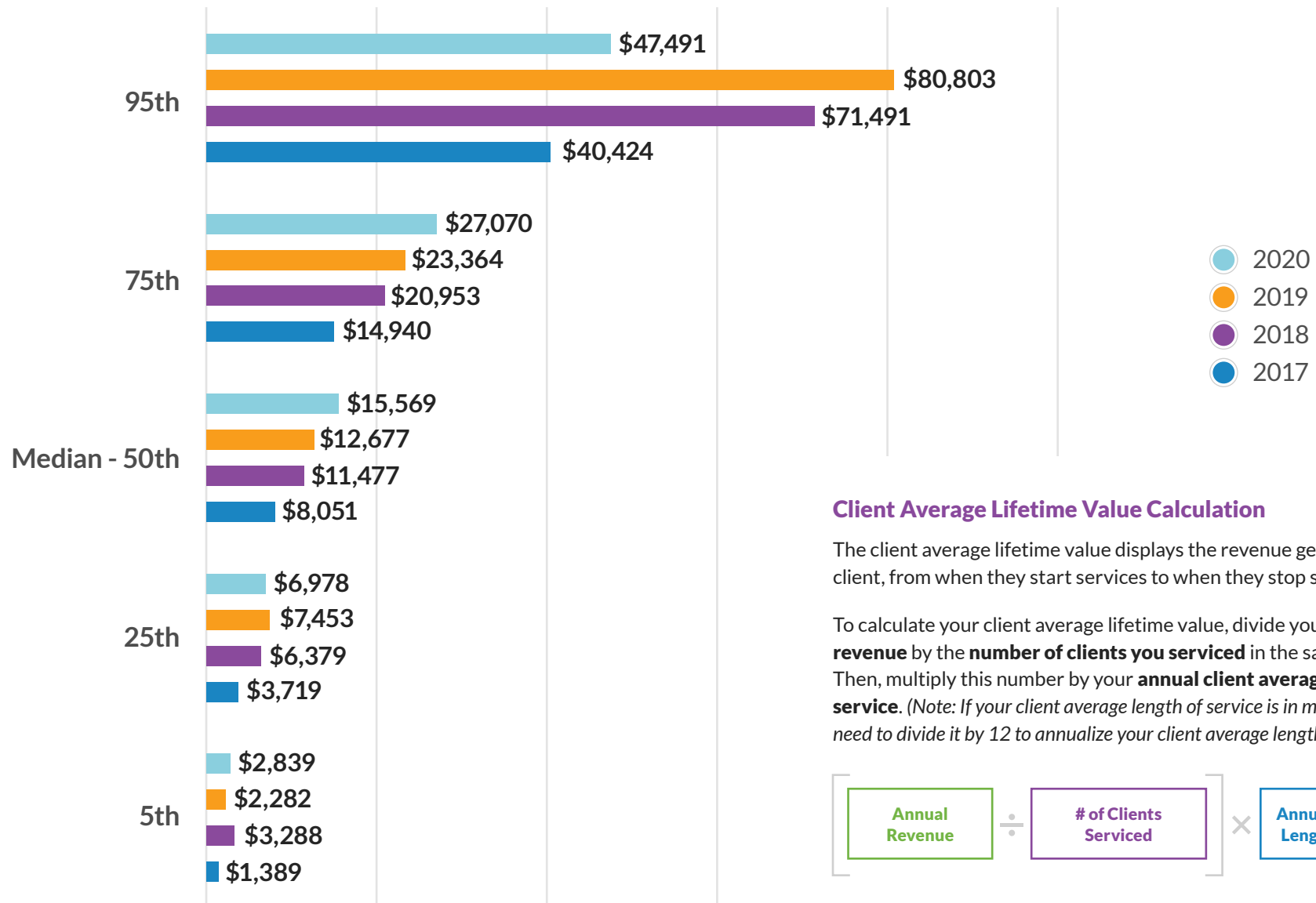
5.8 Historical Client Average Length of Service - Percentile Ranking





CLIENT AVERAGE LIFETIME VALUE

5.9 Historical Client Average Lifetime Value - Percentile Ranking



Client Average Lifetime Value Calculation

The client average lifetime value displays the revenue generated per client, from when they start services to when they stop services.

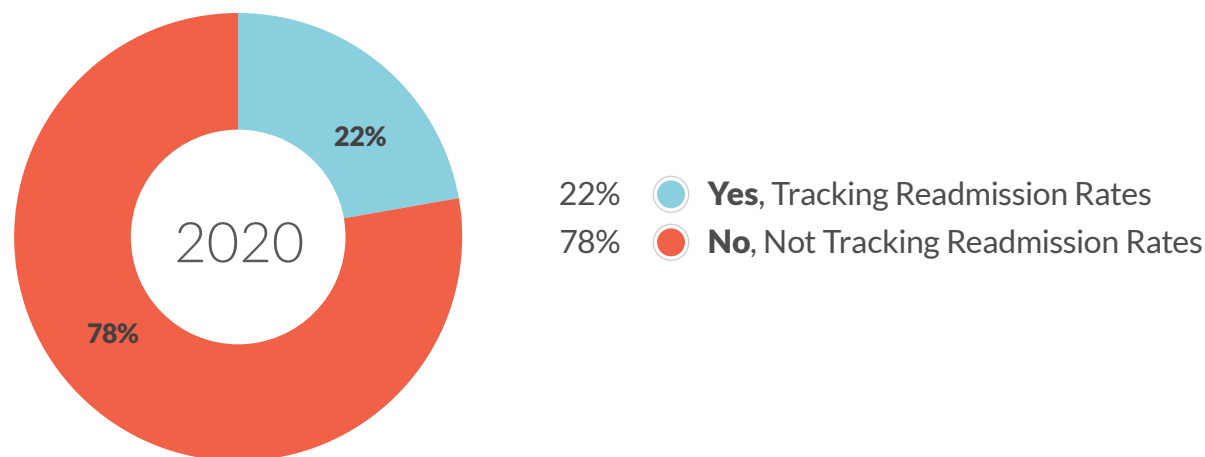
To calculate your client average lifetime value, divide your **annual revenue** by the **number of clients you serviced** in the same year. Then, multiply this number by your **annual client average length of service**. (Note: If your client average length of service is in months, you will need to divide it by 12 to annualize your client average length of service.)

$$\left[\frac{\text{Annual Revenue}}{\text{\# of Clients Serviced}} \right] \times \text{Annual Client Avg. Length of Service}$$



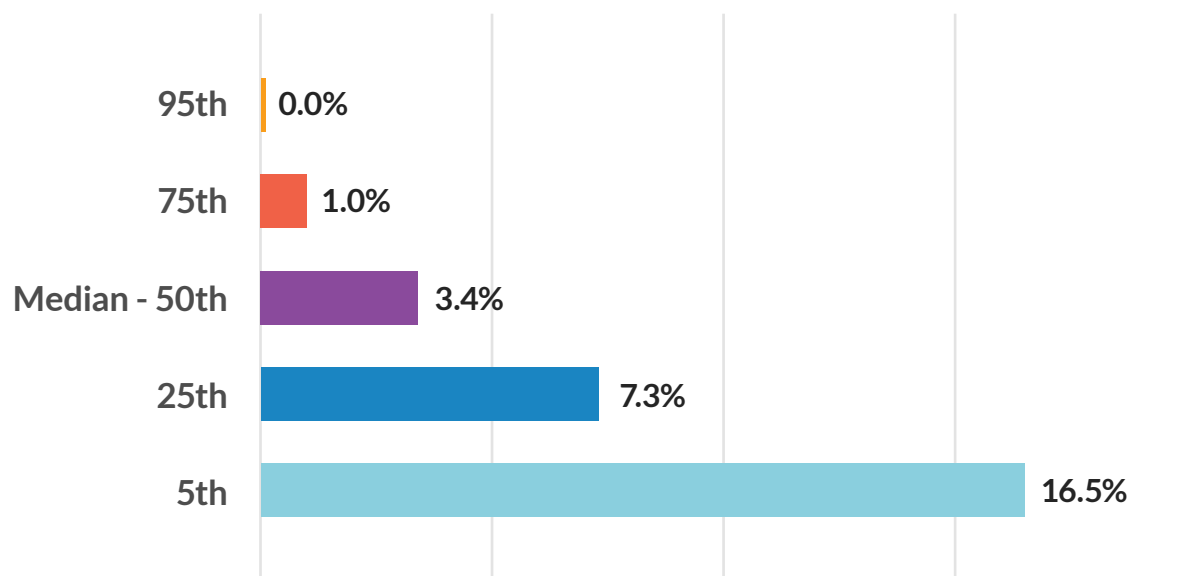
READMISSION RATES

5.10 Percentage of Providers Tracking Hospital Readmission Rates for 2020



READMISSION RATES

5.11 Hospital Readmission Rate for 2020 - Percentile Ranking

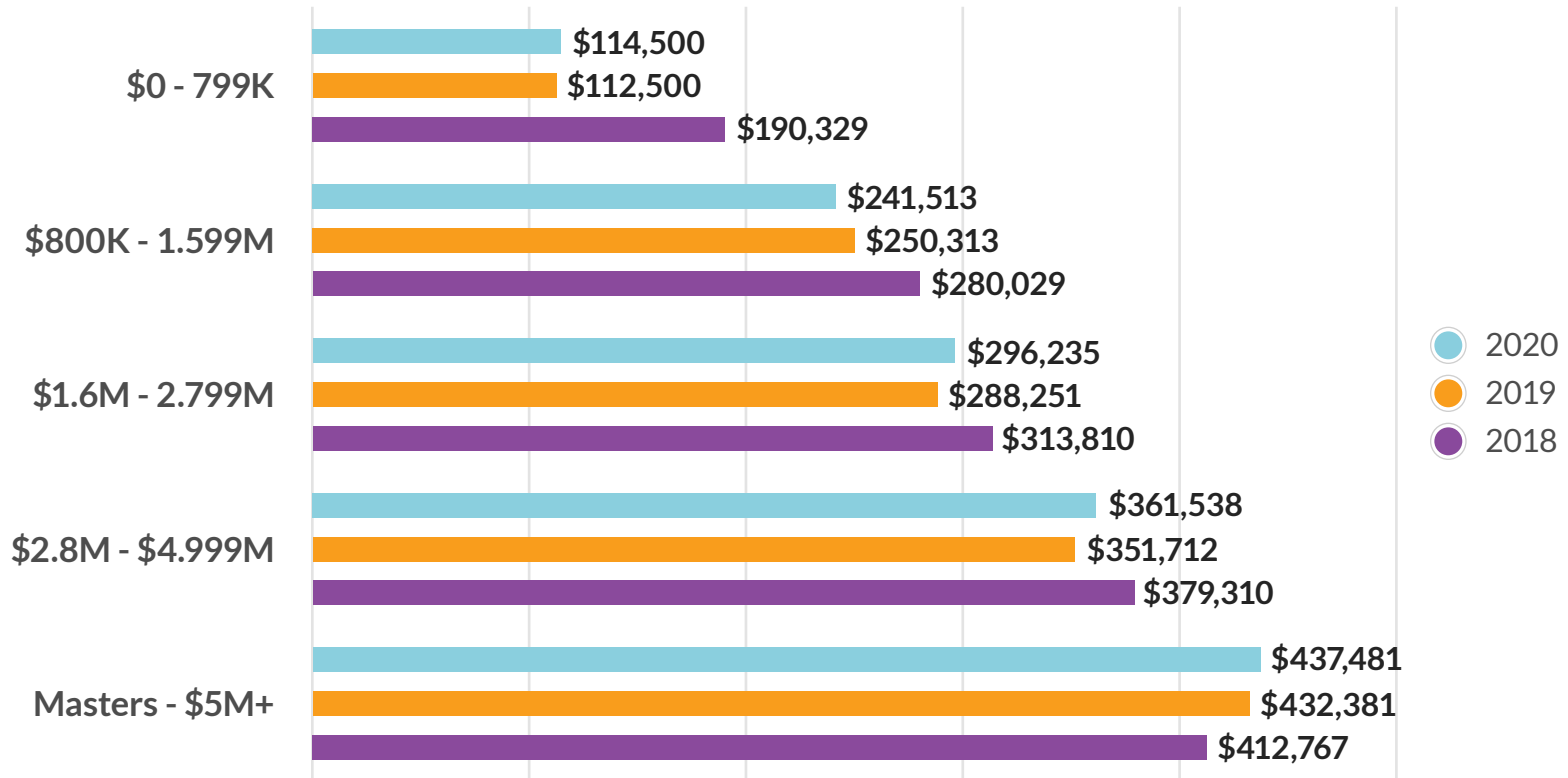


Due to the relatively low number of providers tracking admissions rate, this data is taken from an unusually small sample size of 97 providers. While we have included it here to provide a starting benchmarking for readmission rates, we recognize the risks associated with small sample sizes and anticipate securing data with larger sample sizes in future years.



SALES PER FULL-TIME EMPLOYEE

5.12 Historical Sales per Full-Time Employee - Revenue Ranges



Sales per Full-Time Employee

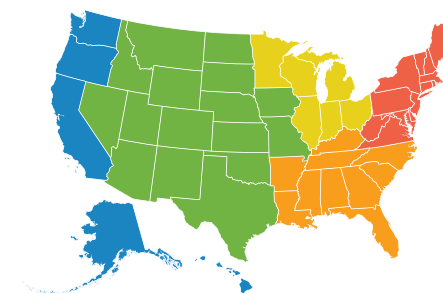
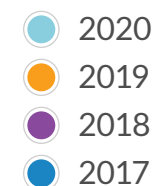
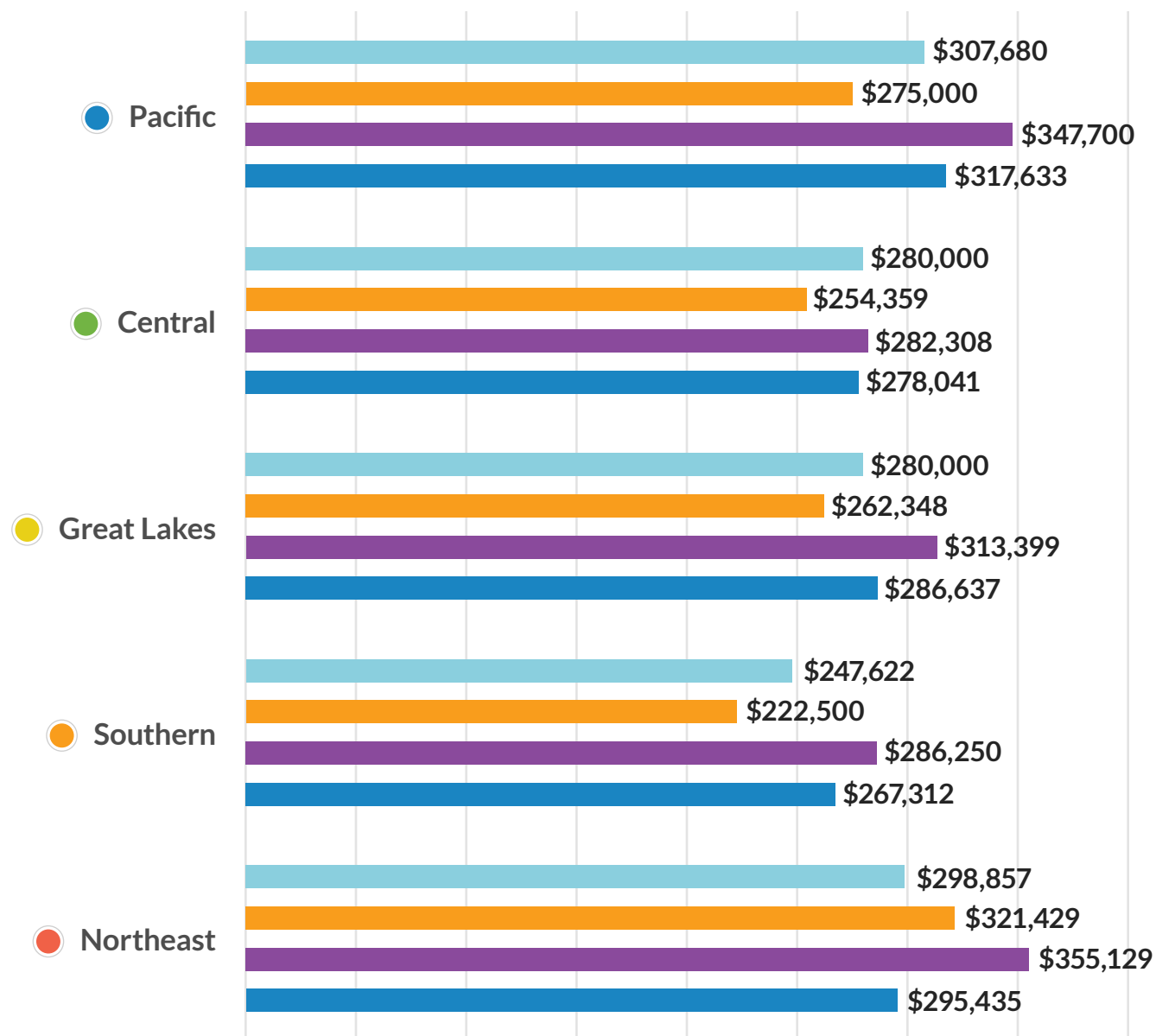
This benchmark emphasizes getting the most out of each employee. Leaders tend to have higher Sales per Full-Time Employee as they learn to run more efficiently on less overhead. Though if sales per full-time employee is too high, your business may be sacrificing quality to save money. This figure represents a benchmark to compare your company against. Sales per Full-Time Employee is calculated by dividing your **annual revenue** (or 12-month trailing revenue) by the **number of office staff** (excluding caregivers, but including active owners you employ). (Part-time employees count as .5 or 1/2.)

$$\boxed{\text{Annual Revenue}} \div \boxed{\text{\# of Office Staff}} = \boxed{\text{Sales per Full-Time Employee}}$$



SALES PER FULL-TIME EMPLOYEE

5.13 Historical Sales per Full-Time Employee for 2020 - Geographic Region

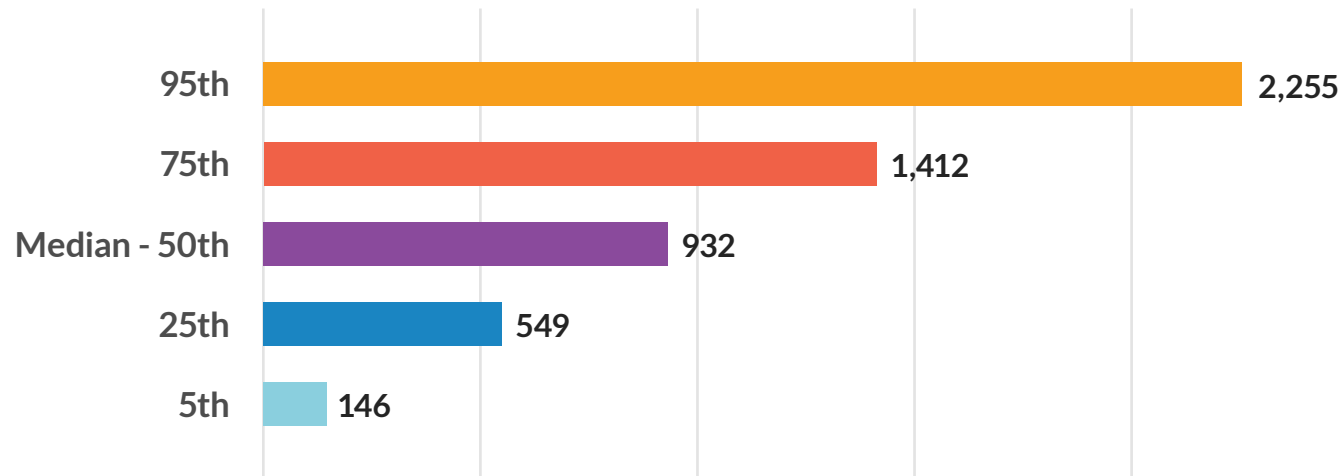


See **page 125** for the Sales per Full-Time Employee calculation.



WEEKLY BILLABLE HOURS

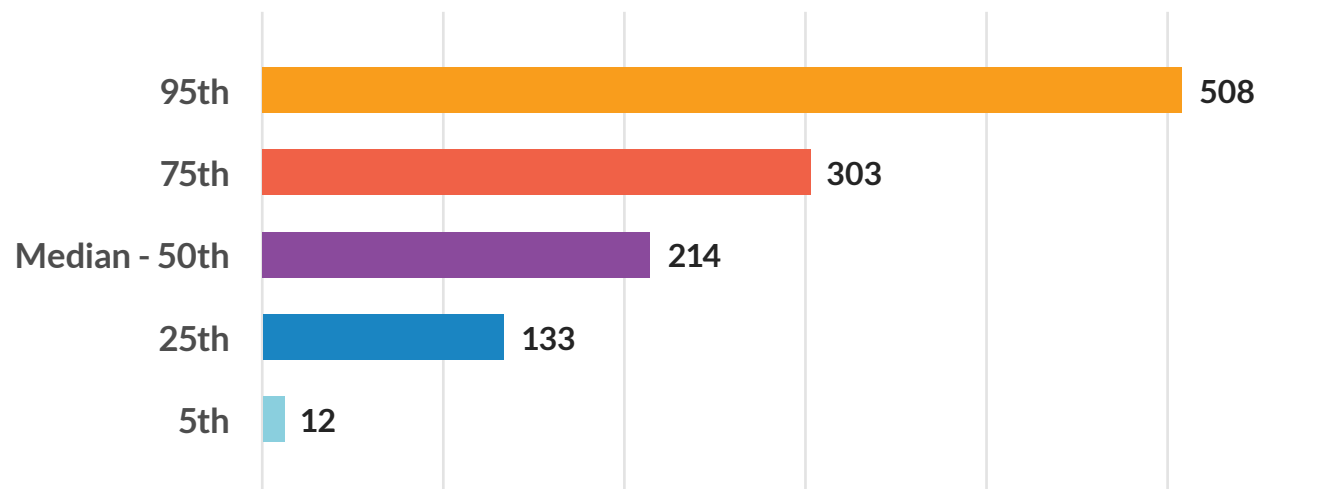
5.14 Weekly Billable Hours per Care Coordinator for 2020



This means the median agency has **1 care coordinator for every 932 weekly billable hours.**

WEEKLY BILLABLE HOURS

5.15 Weekly Billable Hours per Non-Caregiver Employee for 2020



This means the median agency **bills 214 hours for every non-caregiver employee.**



STAFFING SUMMARY

5.16 Number of Office Staff Employed for 2020 - Overall & Revenue Ranges

Percentile	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	\$2.8M - 4.999M	Masters - \$5M+	2020 Median
95th	8	9	12	16	89	29
75th	5	6	9	12	31	10
Median - 50th	3	5	7.5	10	19	6
25th	2	4	5.5	8	14	4
5th	1	3	4	6	7	2

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

STAFFING SUMMARY

5.17 Median Office Staff Annual Salaries for 2020 - Overall & Revenue Ranges

Position	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	\$2.8M - 4.999M	Masters - \$5M+	2020 Median
Active owners (5%+ ownership)	\$60,000	\$75,000	\$100,000	\$125,000	\$150,000	\$95,500
Executives (non-owners)	\$55,000	\$55,000	\$70,000	\$76,000	\$87,500	\$70,000
Admin staff (payroll, billing, secretarial)	\$32,600	\$36,000	\$42,000	\$44,000	\$50,000	\$40,000
Sales reps	\$45,250	\$50,000	\$50,000	\$55,000	\$64,500	\$55,000
Staffing coordinators/care schedulers	\$35,000	\$40,000	\$40,000	\$45,000	\$46,000	\$40,893
Supervisors in the field (checking on clients/caregivers)	\$35,360	\$36,000	\$45,000	\$50,000	\$53,000	\$44,000

Survey participants were asked, "What is the average salary for the following positions (non-caregivers) in your business?" Displayed are the median salaries of those providers who had someone in each of the positions listed.



STAFFING SUMMARY

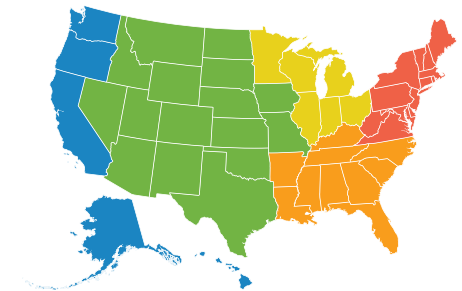
5.18 Median Staffing Summary for 2020 - Overall & Revenue Ranges

Position	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	\$2.8M - 4.999M	Masters - \$5M+	2020 Median
Active owners (5%+ ownership)	1	1	1	1	1	1
Executives (non-owners)	0	0	1	1	2	1
Admin staff (payroll, billing, secretarial)	1	1	1	2	4	1
Sales reps	0	0	0.5	1	2	0
Staffing coordinators/care schedulers	1	1	2	2	4	1
Supervisors in the field (checking on clients/caregivers)	0	0	1	1	3	1

STAFFING SUMMARY

5.19 Median Staffing Summary for 2020 - Geographic Regions

Position	Pacific	Central	Great Lakes	Southern	Northeast
Active owners (5%+ ownership)	1	1	1	1	1
Executives (non-owners)	1	1	1	0	1
Admin staff (payroll, billing, secretarial)	1	1	1	1	1
Sales reps	0	1	0	0	0
Staffing coordinators/care schedulers	2	1	1.5	1	1
Supervisors in the field (checking on clients/caregivers)	1	0	1	1	1





TOP THREATS

5.21 Historical Top 5 Threats Facing Home Care Providers in Coming Year

Rank	Threat	2021	2020	2019	2018
1	Caregiver Shortages	79.4%	72.0%	72.9%	78.7%
2	Caregiver Turnover	40.9%	33.0%	32.3%	29.9%
4	Fight for \$15 Wage Battle (Increase in Minimum Wage)	28.5%	28.0%	31.4%	30.5%
3	Attracting Enough Referrals	26.6%	31.2%	27.1%	24.6%
5	Business Expenses Rising	15.9%	15.9%*	19.4%*	21.8%*

Survey participants were asked, "What do you see as the top three threats to the future growth of your business in 2021?"

*This is the first year that **Business Expenses Rising** has been on the top 5 threats list. In previous years, this spot was held by **Increasing Competition** and the values for Increasing Competition are displayed.

OFFICE STAFF TURNOVER

5.20 Office Staff Turnover for 2020 - Overall & Revenue Ranges

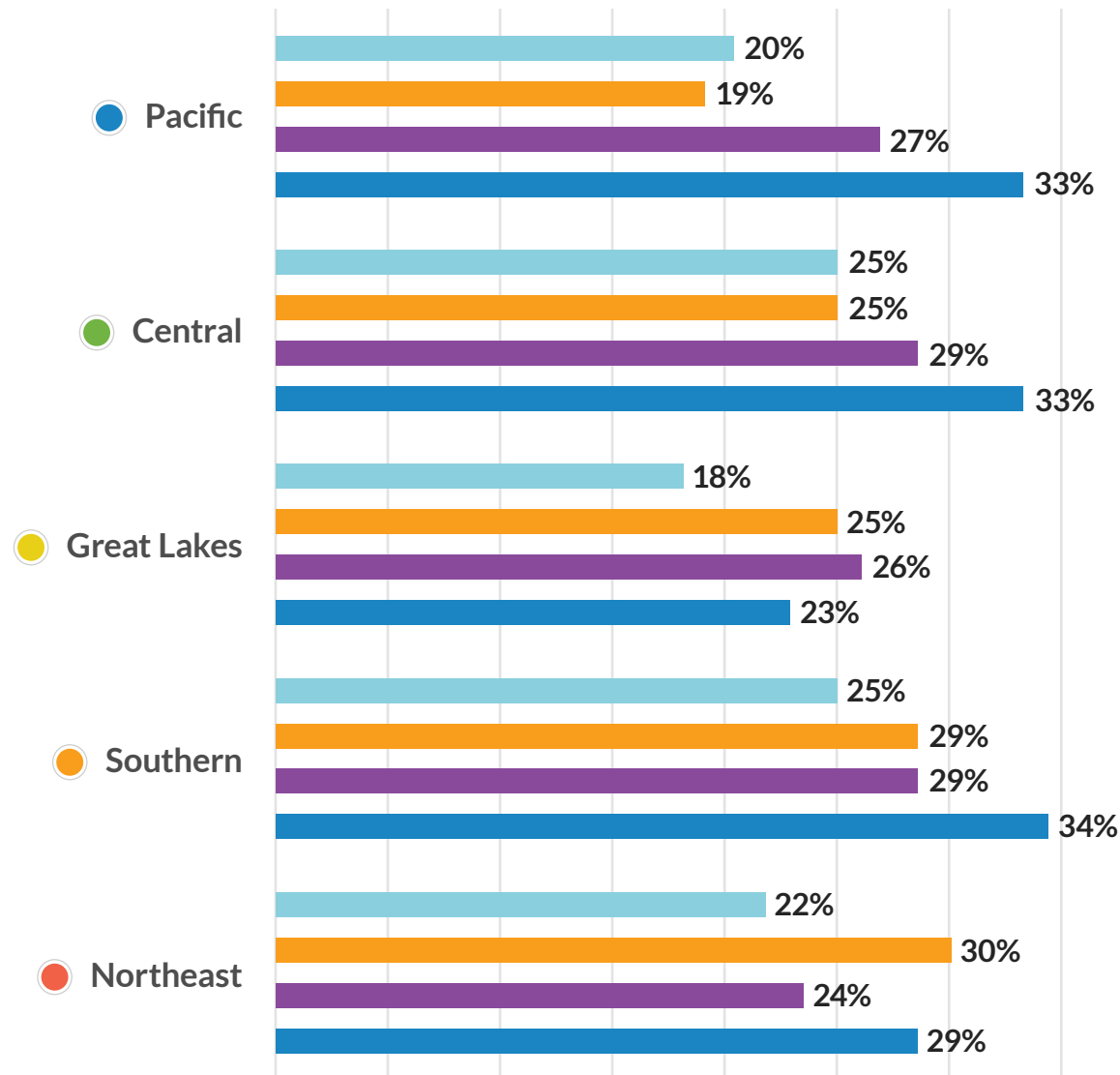
Percentile	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	\$2.8M - 4.999M	Masters - \$5M+	2020 Median
95th	0%	0%	0%	5%	2%	0%
75th	17%	11%	14%	12%	11%	11%
Median - 50th	33%	25%	25%	20%	17%	22%
25th	67%	40%	36%	32%	28%	36%
5th	149%	100%	77%	78%	41%	100%

Percentile graphs illustrate rankings on a scale from 1%-100%. For example, if your results, based on the value above, fall somewhere in the 75th percentile, you are exceeding 75% of the industry in that particular measurement.

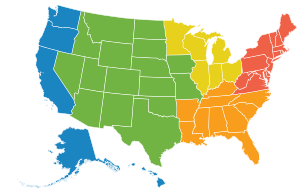


OFFICE STAFF TURNOVER

5.22 Historical Median Office Staff Turnover - Geographic Regions



2020
2019
2018
2017



Office Staff Turnover Calculation

Office Staff turnover represents the percent of office staff who quit or were terminated in 2020. Providers had to have been in business for at least one full year. Basic office staff turnover is calculated by taking the **number of office staff who quit or were terminated** in the year and dividing that number by the **average number of office staff employed** in the same time period.

$$\frac{\text{\# of Office Staff Quit/Terminated}}{\text{Avg. \# of Office Staff Employed*}} = \text{Office Staff Turnover Rate}$$

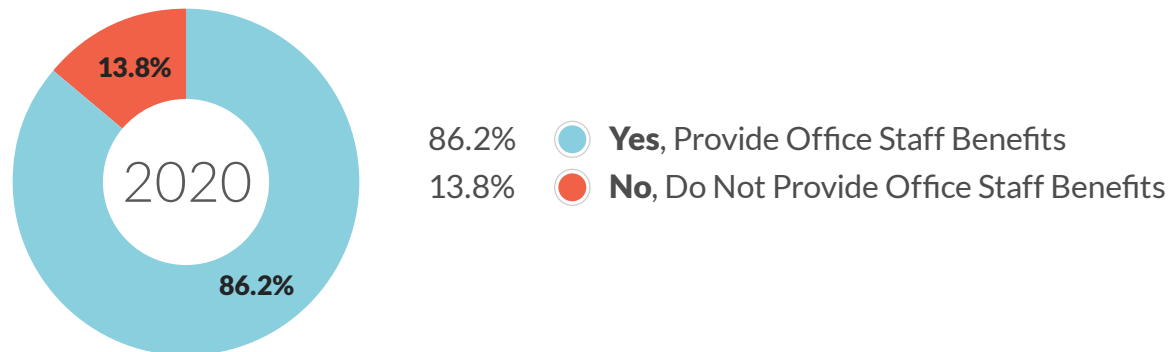
*To calculate your average number of office staff employed during a year, take the sum of the number of staff employed at the end of one year (e.g. Dec. 2019) and at the end of the next year (e.g. Dec. 2020) and divide that number by 2.

$\# \text{ of office staff employed (Dec. 2019)} + \# \text{ of office staff employed (Dec. 2020)} \div 2 = \text{Avg. \# of Office Staff Employed}$



OFFICE STAFF BENEFITS

5.23 Provided Office Staff Benefits in 2020



OFFICE STAFF BENEFITS

5.24 Office Staff Benefits Provided in 2020 - Overall & Revenue Ranges

Benefits	\$0 - 799K	\$800K - 1.599M	\$1.6M - 2.799M	\$2.8M - 4.999M	Masters - \$5M+	2020 Median
PTO	64.3%	76.0%	89.6%	92.6%	91.3%	79.9%
Major Health	33.3%	49.3%	68.7%	70.6%	91.3%	60.2%
Dental	31.0%	44.0%	56.7%	61.8%	80.4%	52.0%
Travel Reimbursement	40.5%	53.3%	50.7%	60.3%	58.7%	50.3%
Sick Leave	38.1%	34.7%	56.7%	52.9%	69.6%	49.0%
Supplement (i.e., Aflac)	26.2%	46.7%	53.7%	50.0%	52.2%	44.4%
401K Matching	23.8%	41.3%	49.3%	55.9%	63.0%	43.4%
Daily/Weekly Pay	33.3%	17.3%	31.3%	27.9%	32.6%	27.7%
Education Reimbursement	16.7%	22.7%	19.4%	25.0%	17.4%	19.5%
Profit Sharing	7.1%	10.7%	17.9%	14.7%	8.7%	11.9%
FSA or Cafeteria Plan	4.8%	4.0%	6.0%	13.2%	13.0%	7.4%
DCAP (Depend Care Assistance Program)	0.0%	0.0%	1.5%	0.0%	2.2%	0.8%
Childcare or Daycare Services for Caregivers	0.0%	0.0%	3.0%	0.0%	0.0%	0.5%

A photograph of an elderly woman with short, curly grey hair wearing a light blue surgical mask. She is looking towards a caregiver whose back is to the camera. The caregiver has long brown hair and is also wearing a light blue surgical mask and a light blue shirt. The background is a blurred indoor setting.

COVID-19 Impact Report

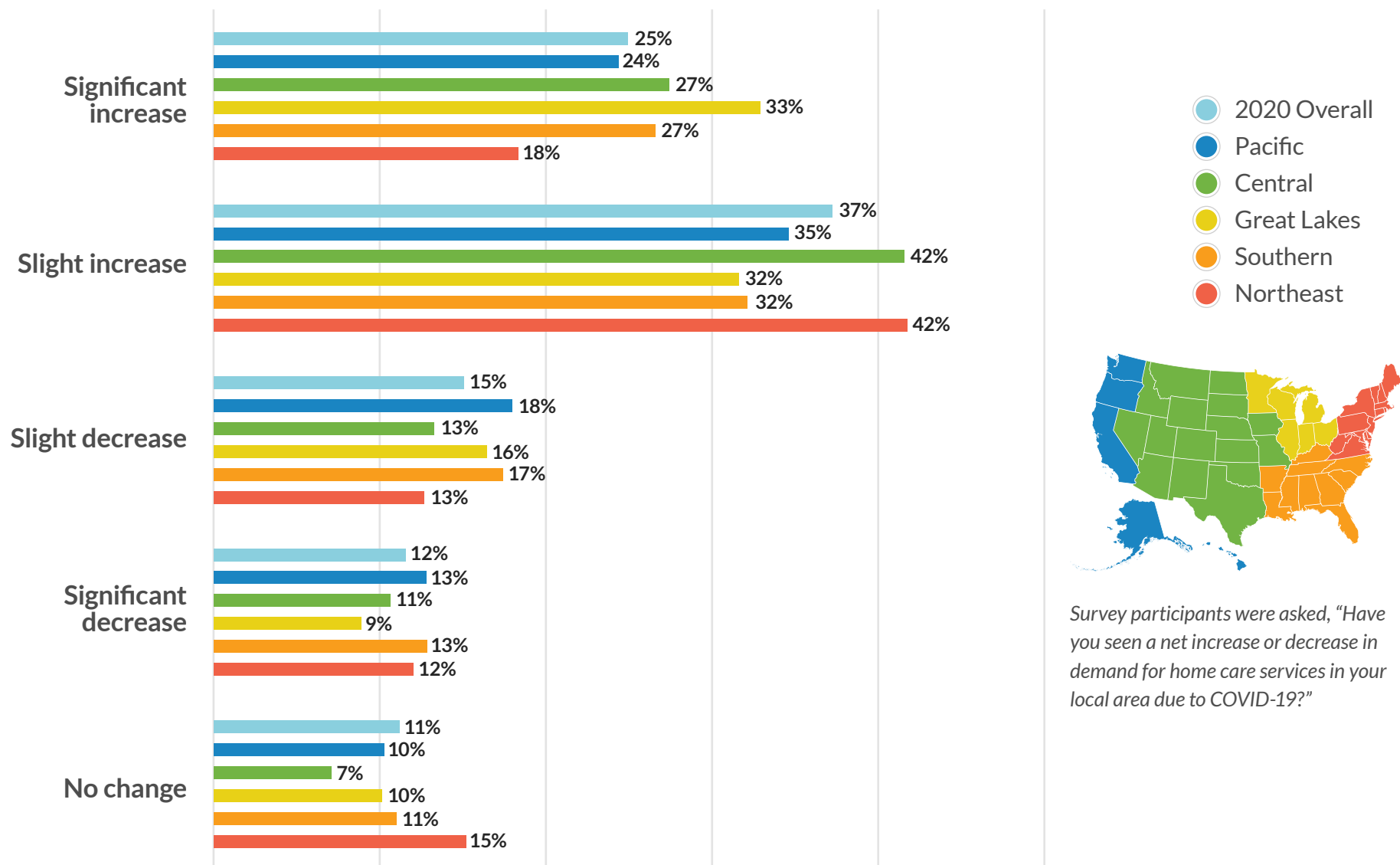
Section Summary

2020 was a year like no other. Recognizing that the pandemic changed agency operations in unprecedented ways, we included COVID-specific questions in this year's survey. We hope it will provide perspective on the challenges of the past year and help agencies find new ways to succeed in the face of challenges of any kind.



COVID-19 IMPACT REPORT

5.25 Demand for Services Since COVID - Overall & Regions





COVID-19 IMPACT REPORT

5.26 Operational Changes Made During Pandemic - Overall & Regions

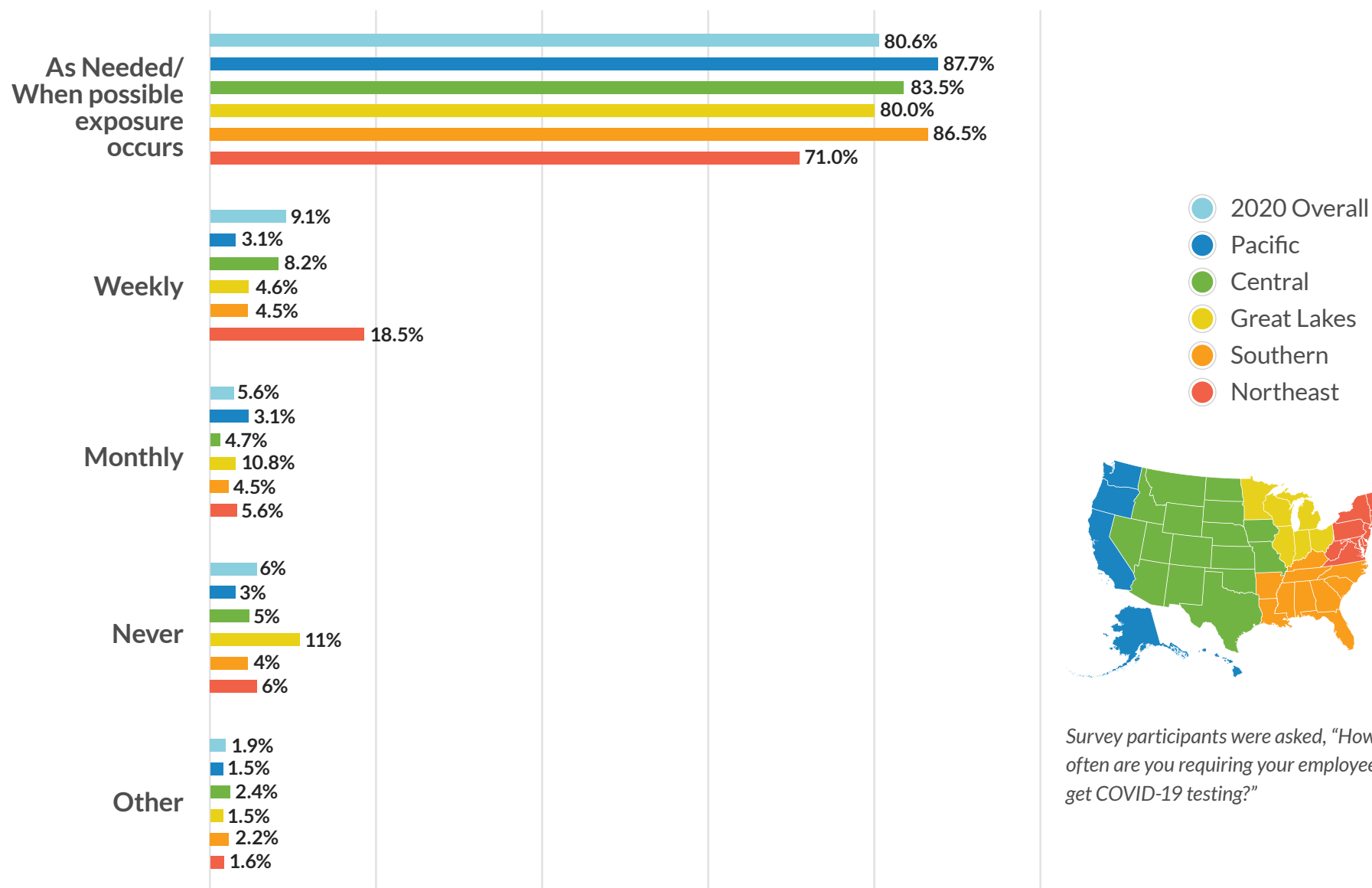
Benefits	Pacific	Central	Great Lakes	Southern	Northeast	2020 Median
Virtual Recruitment	85%	69%	74%	76%	81%	77%
Remote Office Support Staff	63%	51%	65%	54%	63%	59%
Adding Online Caregiver Training	48%	49%	37%	44%	50%	46%
Shift in Focus to Digital Marketing	39%	41%	40%	50%	44%	43%
New Technology Adoption	39%	30%	40%	38%	43%	38%
Taking in COVID-positive Clients	18%	36%	24%	22%	30%	27%
Adding Non-traditional visit formats (virtual visits, grocery drop-off only, etc.)	32%	11%	29%	24%	29%	25%
Inside Sales	26%	20%	19%	12%	20%	19%
Charging for PPE	21%	23%	15%	21%	15%	18%
Adding Telehealth Offerings	15%	8%	11%	10%	9%	10%
Other	5%	5%	3%	12%	12%	8%

Survey participants were asked, "Which operational changes have you instituted during the pandemic?
(Select all that apply)"



COVID-19 IMPACT REPORT

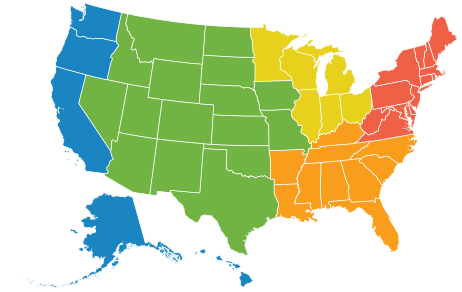
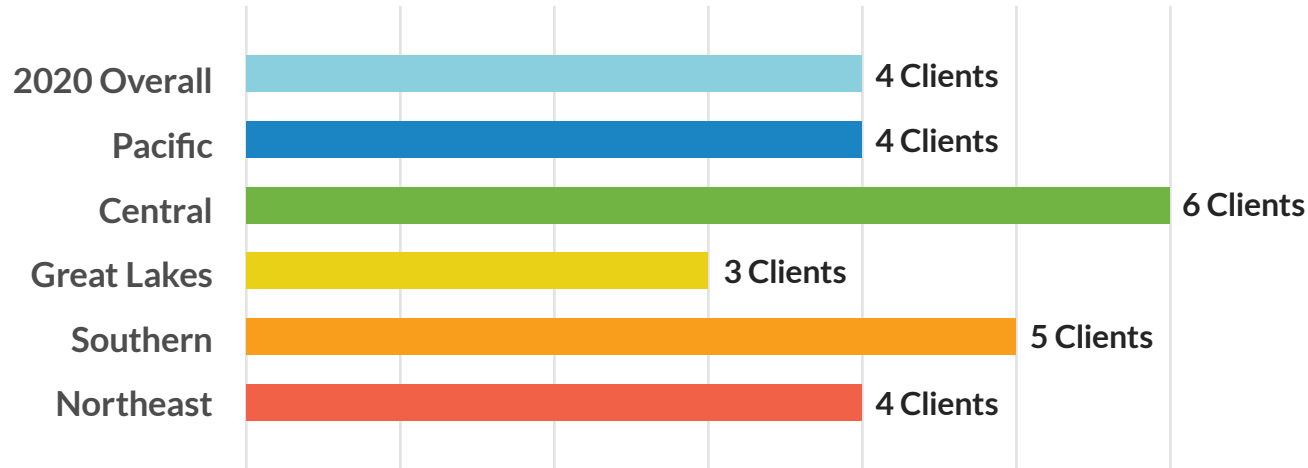
5.27 COVID Testing Frequency - Overall & Regions





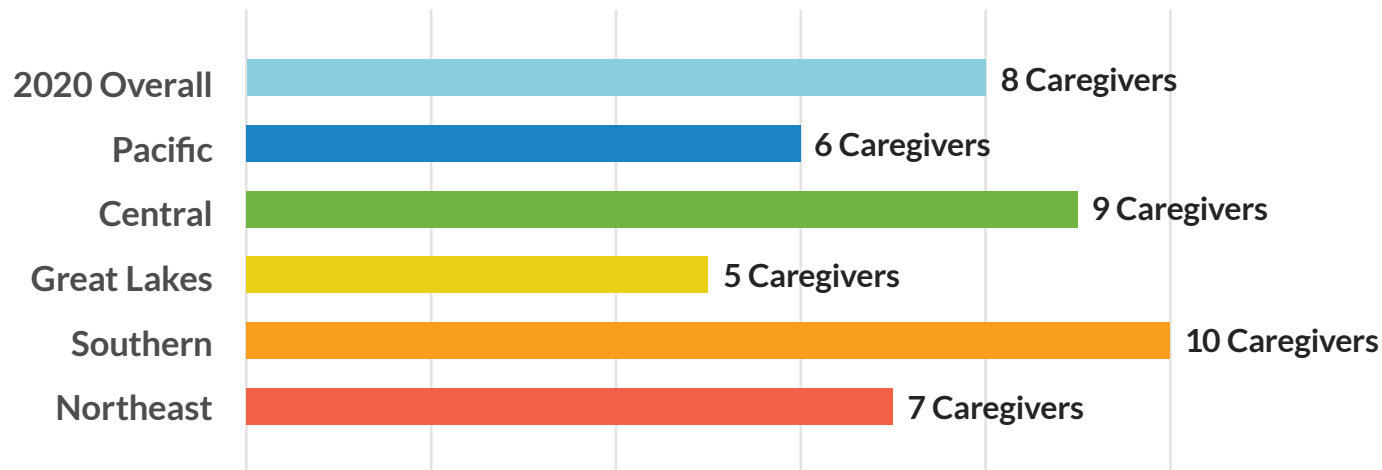
COVID-19 IMPACT REPORT

5.28 Average Number of Clients Who Tested Positive for COVID - Overall & Regions



COVID-19 IMPACT REPORT

5.29 Average Number of Caregivers Who Tested Positive for COVID - Overall & Regions

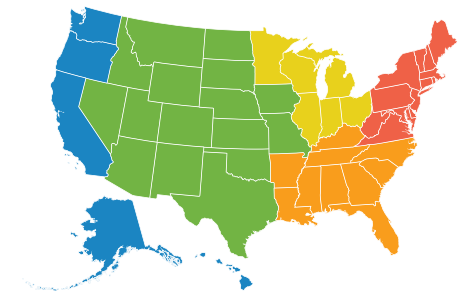
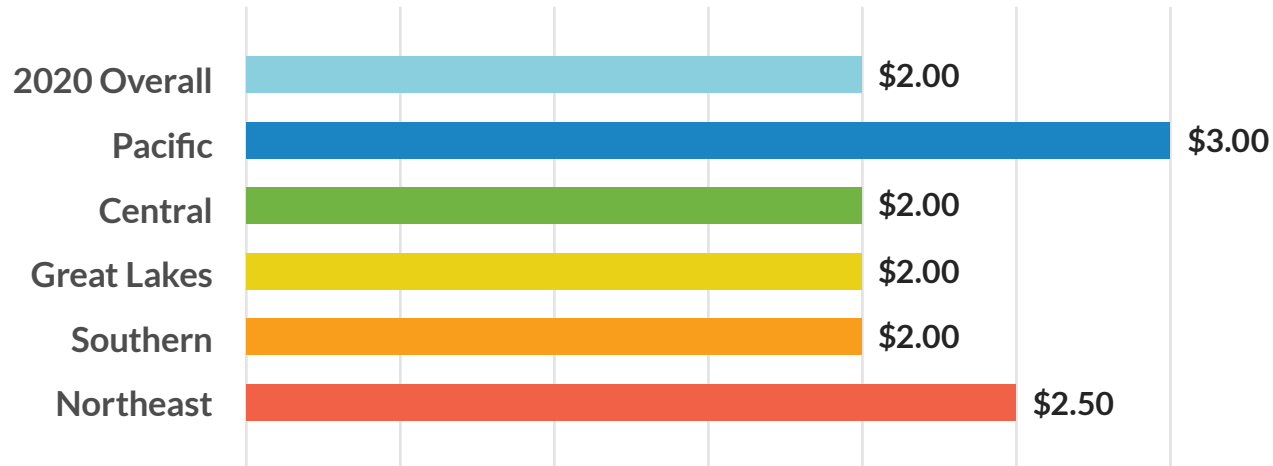


Survey participants were asked, "In 2020, how many COVID-positive clients and caregivers have you served?"



COVID-19 IMPACT REPORT

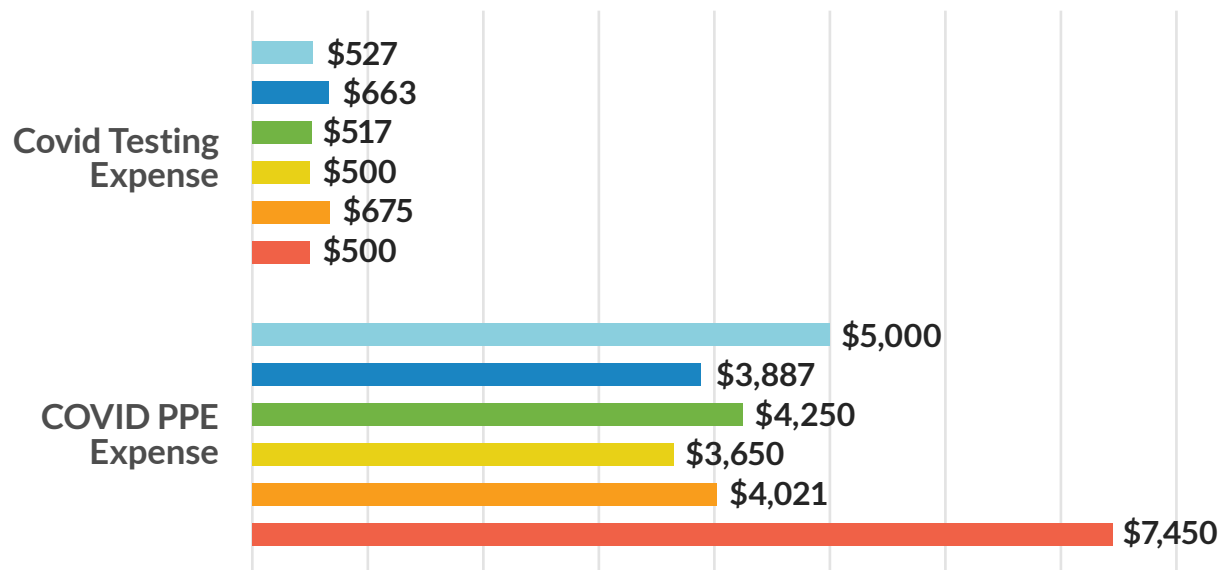
5.30 Median Pay Increase per Hour for Caregivers Working With a COVID Client



Survey participants were asked, "In 2020, how much did your rates increase for COVID-positive clients (in dollars)?"

COVID-19 IMPACT REPORT

5.31 Median COVID Expenses - Overall & Regions

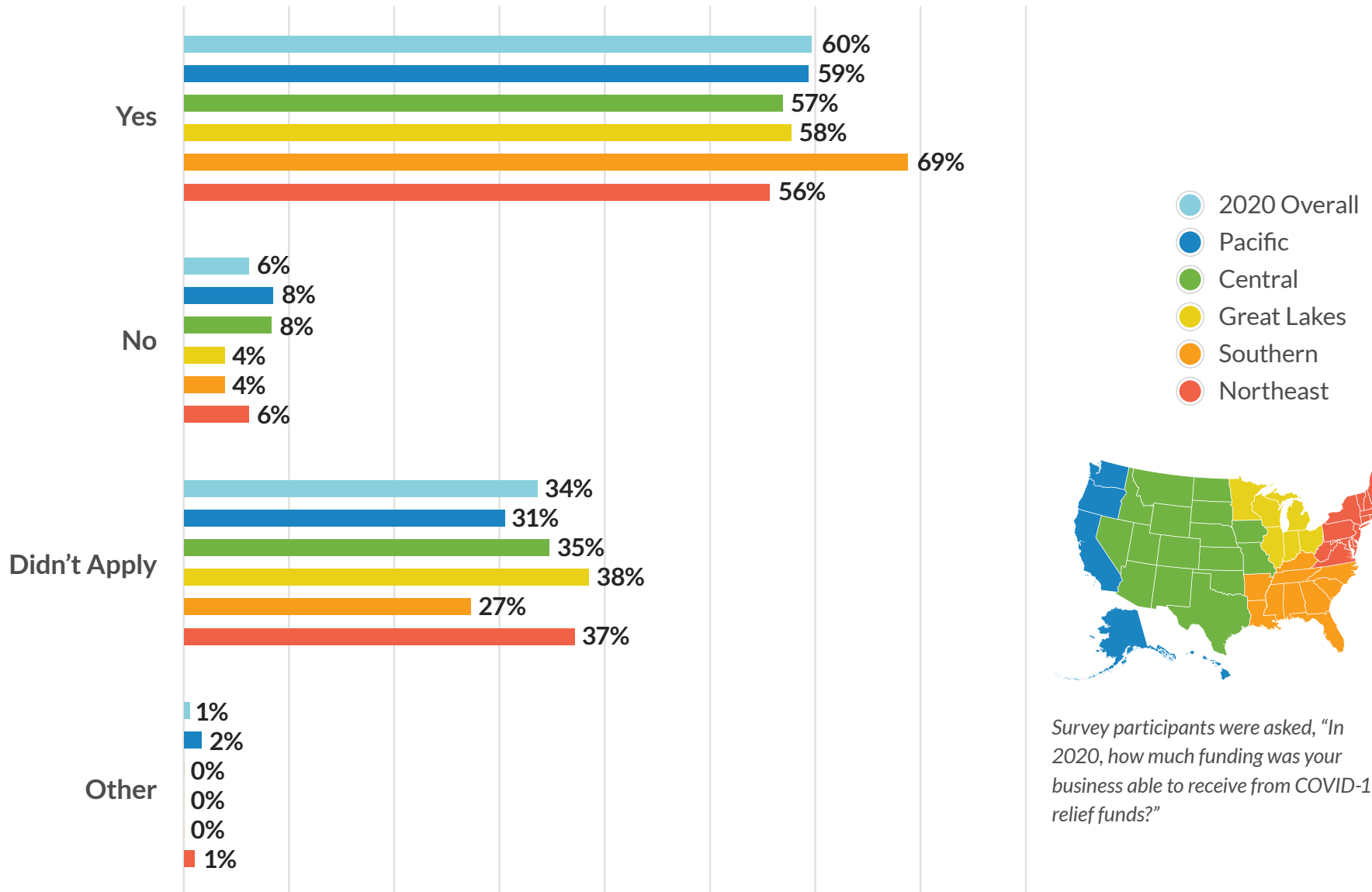


Survey participants were asked, "In 2020, how much did your business spend on COVID-19 testing and PPE?"



COVID-19 IMPACT REPORT

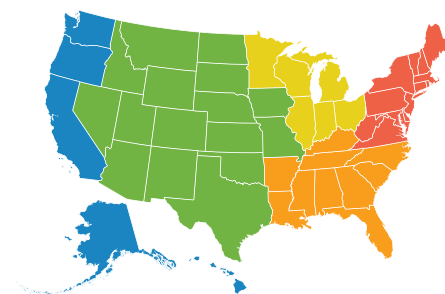
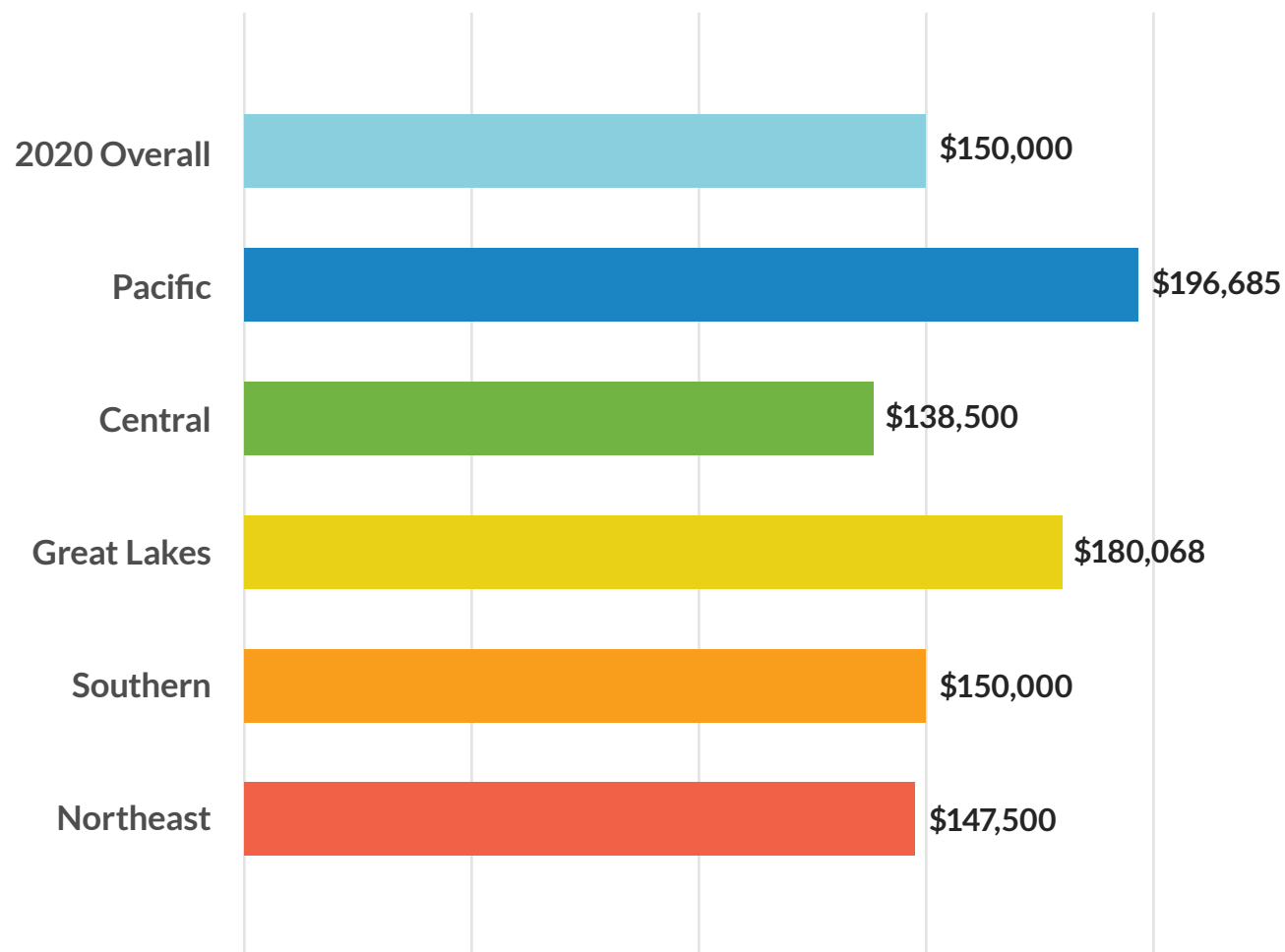
5.32 Received SBA Loan/Grant - Overall & Regions





COVID-19 IMPACT REPORT

5.33 Median COVID Relief Funds Received - Overall & Regions



Survey participants were asked, "In 2020, how much funding was your business able to receive from COVID-19 relief funds?"



Vicki Demirozu

National Director of Personal Care and Support Services
Interim Healthcare

ARTICLE

Successfully Operating and Thriving through COVID-19

Adaptation and change are an integral component in providing care in the home. Whether it is something as simple as a client deciding to have breakfast in bed instead of eating at the kitchen table or a sudden decline in their health, private duty home care providers are accustomed to flexing at a moment's notice.

Home Care's Success Through Disaster

We have experienced and overcome many natural disasters—everything from floods and hurricanes, to tornadoes, earthquakes, and wildfires. We have been tested in unknown territories with disease outbreaks from HIV in the 80s to SARS in 2002 and H1N1 in 2009. Yet, nothing could have prepared us for what we faced due to the COVID-19 outbreak in 2020, an unprecedented year not only at home but around the world.

Overnight, COVID-19 altered the landscape with activities of daily living in the home for all of us. For those receiving and delivering care in the home, the change was even greater. Beginning March 11, 2020, operating “business as usual” was not possible, but our mission to serving and providing care remained.

Immediate refinement of protocols and procedures was necessary, whether it was sourcing, acquiring, or delivering PPE, adapting to remote workforce teams and hiring practices, or providing daily educational updates to our staff, caregivers, clients, families, and referral sources. Each day was met with frequent changes

in the CDC guidelines, additional information recognizing signs and symptoms of COVID-19, implementing quarantine policies for employees, and updating best practices in caring for COVID-19 positive clients. Despite the challenges presented, the operational components of serving our communities, employees and clients continued. The resilience shown in our industry workflows, operations, and service delivery was astounding!

In my 29 years of service, I personally have never been so proud to be a part of the private duty industry and witnessing the unrelenting, tireless, nimble, and dedicated role of our industry leaders, owners, managers and operators, internal teams, and caregivers.

Key Drivers for Successful Offices:

A strong culture in knowing what services they delivered:

- Visits, hourly, live-in, 24/7 services or areas of specialization such as Alzheimer's and dementia care.

Maintaining and Measuring KPIs:

Beginning each day with a “15-minute Huddle” including all team members, whether a Recruiter, Salesperson, Scheduler, Manager, or Owner (recognizing that some individuals wear several of those hats), to discuss the quantitative, practical, and directional data to determine the company's direction on that day to allocate and deploy



resources where most needed, allowing them to pivot quickly to make the necessary changes.

Data Discussed:

- Number of sales calls made (How did we adjust our sales process to stay connected to our referral sources?)
- Number of inquiries (Is the telephone ringing, and are we doing a good job of instilling confidence, trust, and safety to the caller to be invited into the home?)
- Number of home evaluations (Did we meet with the clients immediately or postpone?)
- Number of new admissions (Did the client and family feel at ease with our meeting?)
- Number of new clients (Did we take time to celebrate our success stories?)
- Clients on hold or cancellations (Did we provide enough education about our protocols for COVID-19 to help families feel safe having care in the home? Did we offer our ability to provide virtual check-ins? Did we offer

hourly services when adult daughter was torn between work and homeschooling while moving mom in?)

- Client discharges (Did we call weekly to monitor progress of family providing care?)
- Caregiver call offs (Are we doing a good job of educating our aides? Are we providing enough PPE education and protocols? Are we offering to provide rides to work, or offering child-care alternatives?)
- Number of caregivers in the pipeline (Did we maintain an aggressive recruitment campaign, or did we retreat?)
- Number of caregivers hired (What does that look like today vs. a month ago? Are we changing our outreach strategy? Are we adapting to accommodate the candidate? Are we excited when they apply? Did we offer an exciting and educational virtual onboarding experience?)
- Number of hours today (Are they up, the same, or down and why?)
- Number of hours added (Are we recruiting to meet the needs?)

- Number of hours discharged (What are the reasons and likelihood of returning?)

Re-Adjustment of Service Offerings:

- Knowing their core services allowed successful agencies to have a flexible mindset for what they were and were not able to provide to clients
- Virtual technology implemented immediately for check-ins
- Virtual technology implemented for family meetings and updates
- Virtual technology implemented for “caregiver connections” to discuss questions, challenges, solutions as a group and share praise
- Offered task-based services versus going into the home to include shopping, pharmacy, and meal delivery
- Moved clients out of ALFs into a family member’s home with 24/7 care at a moment’s notice
- Offered creative activities to clients in ILF, ALF and SNF buildings with no access to visitors such as





painting pictures on the outside of resident's windows, drive by parades, delivering cards made by church members and neighborhood communities, hosting virtual Bingo or Name That Tune sing-alongs

- Turning requests for hourly cases up to 8 hours to become live-in opportunities, limiting exposure for aides and clients (adhering to all rules for live-in)
- Ramped up social media presence sharing uplifting stories of care, creativity, and courage by our internal and external teams

Whether it was growing the hours of service, stopping the attrition, or simply maintaining the office's day-to-day practices, the agencies that took a proactive step to creating solutions to the everchanging tasks at hand versus a reactive approach fared far better.

Whether you are a start-up office or a mature organization with many decades of experience, you should continually remind your teams of the importance of tracking and measuring key areas of the business. "Benchmarking has always been a best practice for businesses and organizations.

Identifying and analyzing metrics that are important to your operation and comparing them to peers and those in your industry allows you to craft realistic goals, maintain team accountability and plan for the future." Those that "planned for the future" came out on top.

I strongly believe that this is our time, and the light is truly shining on the critical role of private duty care in the home as not only an alternative, but a viable solution, allowing individuals to remain independent in the comfort of their homes or place of residence. It remains my privilege to work in this industry. 🏠

ABOUT THE AUTHOR

Ms. Vicki Demirozu is the National Director of Personal Care and Support Services for Interim Healthcare, Inc, and is a 26-year veteran in the home care industry.

Ms. Demirozu joined Interim Healthcare in 2008, where she uses her hands-on home care experience in sales, recruitment, onboarding and retention, service delivery, management, and operations to provide strategic growth initiatives. She thrives when working with franchisees to teach, train, mentor, and continually refine and grow personal care and support services within the Interim Healthcare Network with a focus on customer service. Ms. Demirozu also works with targeted National Account Partnerships.

She began her career at Kelly Home Care, a division of Kelly services, Her passion for working in this field led her to hold successive positions beginning with a single location in Miami, Florida, in 1992. This was followed by a move to Los Angeles in 1997 to open an office from the ground up, becoming a District Manager for the Southern California Territory and then becoming the National Sales Director which facilitated her relocation to Charlotte, North Carolina in 2007.

Ms. Demirozu is a graduate of Richmond, the American International University in London, England, where she graduated with a double major in Business Administration and Economics. Richmond remains the only American university in England that is accredited by both the UK and the USA.

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ARTICLE

Success for Your Schedulers:

How to Build & Retain Caregiver Relationships



Linda Leekley

Chief Clinical Officer | Home Care Pulse
Founder | In the Know

home care pulse

intheknow
A home care/pulse COMPANY

If you ask any home care administrator to name the top three obstacles to success, one of those challenges is likely to be caregiver turnover. This is borne out by the data in this year's Benchmarking Study which shows that nearly all the gains made in caregiver retention in 2019 were wiped out by the pandemic.

Maybe it is time to consider a new approach to caregiver retention. Maintaining a loyal team of caregivers is causally linked to the success of your scheduler or care coordinator. Last year's Benchmarking Study revealed that the average turnover rate for office staff was about 25%. In addition, the data showed that, on average, for every office staff member who quits, your agency loses five caregivers.

This is especially true for schedulers because they serve as the link between clients and caregivers. If that link is broken because a scheduler leaves, caregivers may feel untethered, frustrated, or even neglected. As a result, communication errors build up, causing caregivers to look for other jobs.

While much of the focus in home care is on training caregivers as part of a retention strategy, you can see from this data that training is equally important for your office staff. Providing your scheduling staff with the training they need to succeed can help tame caregiver turnover at your agency.

Offer the Right Job-Specific Training

Aside from the technical skills your schedulers need to learn, such as using any scheduling

software and communication tools, there are a few job-specific skills unique to the role of the scheduler. Providing training on these skills will support both scheduler and caregiver retention.

Job Specific Skill #1: Understanding the Role of the Caregiver

"Caregiver" is a general term we use to describe a variety of healthcare helpers, from a companion to a certified nursing assistant. And each type of caregiver has different client care tasks they can and cannot do. Even if you hire a scheduler with home care experience, the role of the caregiver can vary from state to state and even from agency to agency. Before your schedulers ever speak to a client, train them on the role of the caregiver in your agency. Without this knowledge, they may give unrealistic expectations to clients and their families.

Job Specific Skill #2: Matching Clients and Caregivers

Your agency may use scheduling software that helps narrow down caregivers by availability and location, but there is so much more that goes into making a good match. Any training for your schedulers on matching should also include learning how to do the following:

- Compare the client's medical needs to the caregiver's qualifications. For example, if the client has dementia, diabetes, or COPD, the caregiver should be qualified to care for individuals living with those medical needs.



- Match the client's physical needs with the caregiver's physical abilities. For example, a client who is 6 feet 3 inches tall, weighs 270 pounds, and needs assistance while ambulating must be paired with a caregiver who is physically able to help the client.
- Assess personality and culture as part of the matching process. Schedulers need to consider that a shy or reserved client may be dissatisfied by an outgoing, perky caregiver. Your training should also teach schedulers to take issues like language barriers and food preferences into account when matching clients and caregivers.

Job Specific Skill #3: Reviewing the Plan of Care

Because the care plan impacts the client/caregiver matching process, your schedulers should receive training on how to find a care plan, how to read it, and who to reach out to if there are questions.

There are three important features of the care plan that help guide the matching process:

1. The client's medical needs (or diagnosis).
2. The client's physical needs.
3. The frequency of services.

A top complaint we hear when conducting both client and caregiver surveys is that the caregiver is insufficiently prepared to care for the client. Taking the care plan into account during the matching process assists schedulers in assigning qualified caregivers only.

Don't Forget Soft-Skills Training!

Job-specific skills are what most companies focus on when it comes to training. But here is some interesting data: companies that offer soft skills training on topics like communication, time management, and team building enjoy a whopping 250% Return on Investment (ROI) for those training dollars because of increased productivity and retention.

Soft skills provide the necessary foundation for being successful at job-specific skills. For example, a scheduler needs to be a good communicator and a good listener to succeed at matching clients and caregivers.

Soft Skill #1: Handling Conflict and Complaints

Because health care is a people business, conflict and complaints come with the territory. Chances are your schedulers are often caught in the middle between making your clients happy and providing a good work experience for your caregivers. Learning how to manage conflict and complaints is a key skill for every scheduler.

When training your schedulers on this skill, include information on the different ways that people approach conflict. For example, some people avoid conflict like the plague while others see it as a competition they must win at all costs. Your schedulers need to learn how to recognize and manage each approach. You should also give your schedulers some best-practice tips for resolving a conflict, including hearing both sides of a dispute and negotiating a solution.

If your schedulers complete training that helps them understand their role in handling conflict, they will gain the tools they need to remain calm, professional, and respectful whether they are dealing with an angry client or an upset caregiver.

Soft Skill #2: Time Management Skills

Time management training can help your schedulers identify any time-wasting habits they have, such as taking shortcuts. Imagine that your scheduler has three new admissions. Instead of taking the time to get to know the clients' needs and the caregivers' abilities, she "saves time" by selecting the first available caregivers.

What is the result? The caregivers work with the new clients for a few days before it becomes painfully clear the pairs are mismatched. Now because of taking that shortcut, your scheduler must go through the matching process all over again! In addition to wasting time, she

wound up with three sets of unhappy clients and caregivers.

Another time management myth is that multitasking saves time. In fact, multitasking may be costing your schedulers more time than it is saving. Studies show that people who think they are saving time by performing several tasks at once may not accomplish anything as well—or as fast—as if they tackled one task at a time.

By providing your schedulers with training on time management that encourages alternative ways to save time, you will give them the tools they need to complete their work without resorting to short cuts or multitasking.

Soft Skill #3: Relationship-Building Skills

The most successful schedulers are those who are trained to build meaningful relationships with both clients and caregivers.

Connecting with Clients

A scheduler's relationship with clients affects both client satisfaction and caregiver retention. To develop top-notch schedulers, offer training on the following communication skills:

- **Communicating consistently with clients.** A scheduler will earn your clients' trust through regular and reliable communication.
- **Individualizing client communication.** When a scheduler honors the client's communication preferences, it deepens their relationship.
- **Communicating changes promptly.** Informing clients as soon as a schedule change occurs helps prevent stress, confusion, and dissatisfaction.
- **Getting to know their clients.** The best schedulers learn to ask clients about their day—and truly listen to the response. Engaging in a few moments of personal conversation with clients helps the scheduler build lasting and trusting relationships.



As the scheduler builds strong relationships with clients and their families, they will be in a better position to recognize and resolve issues before they lead to an unhappy client and a caregiver who quits.

Bonding with Caregivers

Building relationships with caregivers may be one of the most challenging yet important parts of the scheduler's job. What makes it so challenging? Distance! Only 16% of remote employees (like caregivers) say they feel "connected" to their teams.

Why does this matter? Caregivers who are connected are less likely to quit or "ghost" the scheduler when someone is needed to fill a shift. Caregivers who feel a strong bond with their scheduler experience more satisfaction in their jobs. This feeling trickles down to the quality of care they give to clients. Everyone wins!

To encourage meaningful relationships with caregivers, train your schedulers on these practices:

- **Respect their caregivers.** It is crucial that caregivers feel respected for the contributions they make and the experience they bring to the job. Teach your schedulers to ask caregivers for ideas regarding clients and their care needs—and to take their suggestions seriously.
- **Be an anchor for their caregivers.** Train your schedulers to be that one person caregivers can go to when they have questions, concerns, problems, or even good news about work-related issues.
- **Check in with caregivers regularly.** Texts or app notifications may be efficient methods of communication, but schedulers build a deeper bond when they have regular calls or video chats with caregivers. And a strong bond leads to increased caregiver retention

Set Your Schedulers Up for Success

Home care schedulers serve as an internal and external "face" of your agency, a role that is critical to your daily operations and your reputation in the community. Providing them with the training they need to succeed is a key action that helps drive staff retention. Here are three specific actions you can take to get started:

1. Calculate your current scheduler turnover and see if the 1 to 5 ratio applies. Do you lose five caregivers when you lose a scheduler? This is essential data for your agency.
2. Evaluate your scheduler hiring process to ensure you are adequately assessing a candidate's proficiency in both job-specific and soft skills.
3. Assess the current initial and ongoing training you offer your schedulers. Is it comprehensive, or could you add to it to increase its impact? (Hint: Be sure to study any negative client or caregiver reviews to identify any gaps in training.)

Should you decide that your scheduler training program could use some "punch," what are your options? If you have the time and resources, you can develop your own in-house training for your schedulers. If you use a third-party training vendor, check their course catalog for topics applicable for your schedulers. For example, Home Care Pulse offers online scheduler training as part of our regular eLearning subscription.

The goal of any scheduler training curriculum should be twofold: 1) to develop exceptional home care schedulers who serve successfully as the link between clients and caregivers, and 2) to cut the turnover rate for both your schedulers *and* your caregivers. 🏠

ABOUT THE AUTHOR

Linda Leekley BS, RN is the CEO and founder of In the Know, a premier provider of caregiver training. Linda's passion for nurse aide education makes In the Know the leader in caregiver training solutions. Under her guidance, In the Know training courses are written by registered nurses with caregivers in mind, focusing on their unique responsibilities, duties, experience, and education. Linda's mission is to continue to promote and support the professionalism of caregivers everywhere, so that home care agencies can direct their time and resources toward expanding their business.

Technology

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Executive Summary

Sales & Marketing

Recruitment & Retention

Finance

Operations

Technology

Client/Caregiver Experience

Best of Home Care



SUMMARY

TECHNOLOGY

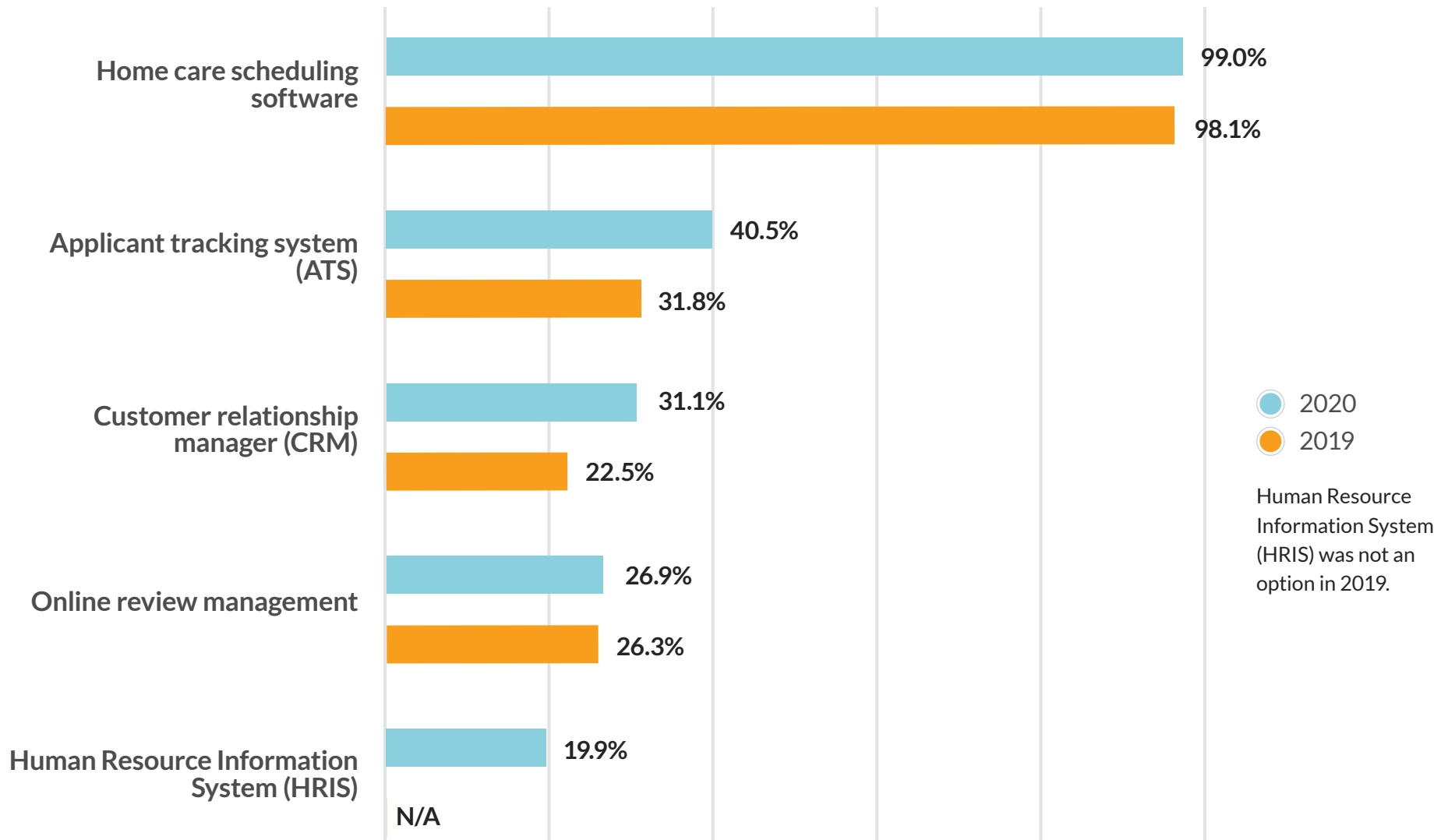
The Technology section of the 2021 Benchmarking Study focuses on the various software platforms that agencies are using to improve their operations, including scheduling software, customer relationship management software (CRM), and applicant tracking systems (ATS). It is intended to provide agencies with perspective on the tools that other agencies are using so they can make informed decisions to stay competitive and make use of the powerful tools available.





HOME CARE TECHNOLOGIES

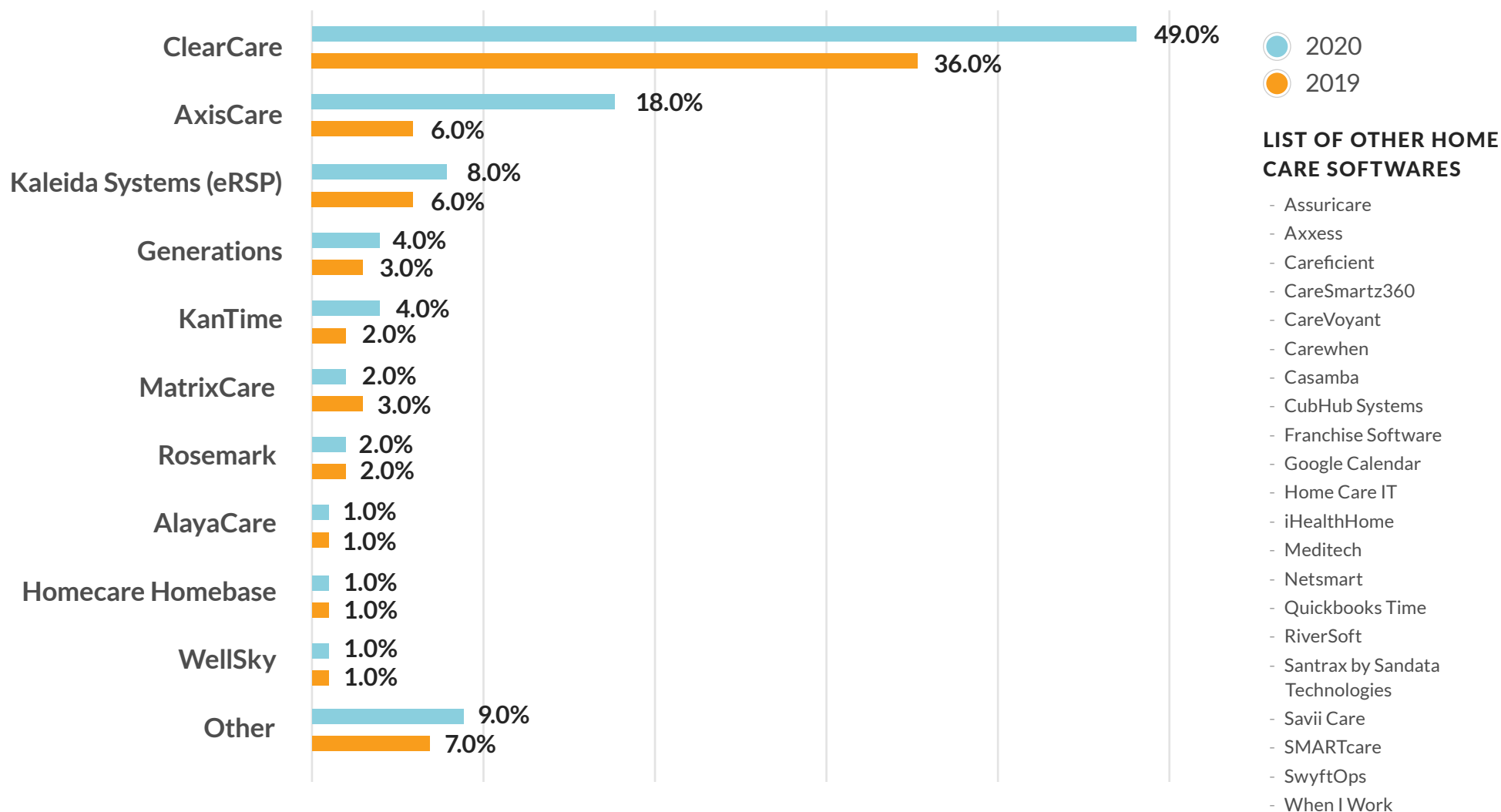
6.1 Technologies Used by Home Care Providers in 2020





HOME CARE TECHNOLOGIES

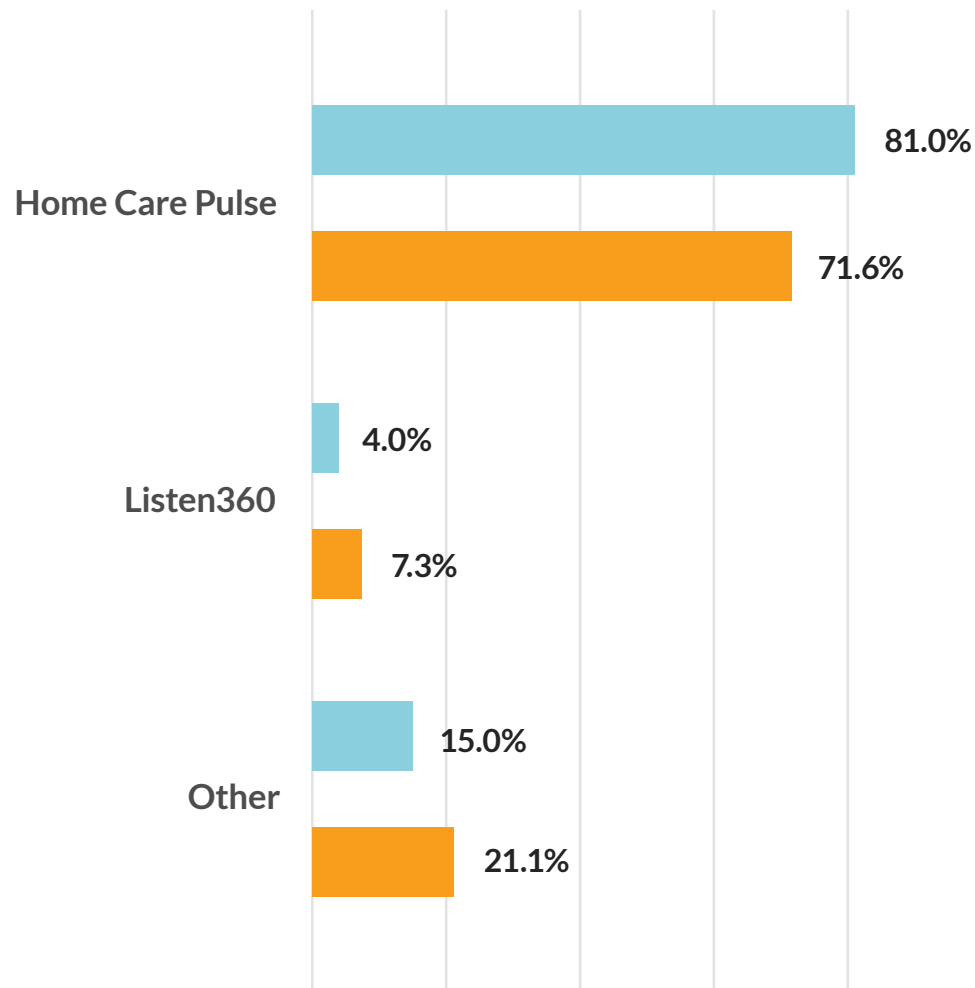
6.2 Home Care Software Used by Home Care Providers in 2020





REVIEW MANAGEMENT

6.3 Review Management Programs Used by Home Care Providers in 2020



● 2020

● 2019

Review management programs are software platforms that home care agencies can use to strengthen their online review presence by gathering more reviews, responding to existing reviews, and/or monitoring reviews across different sites from one place.

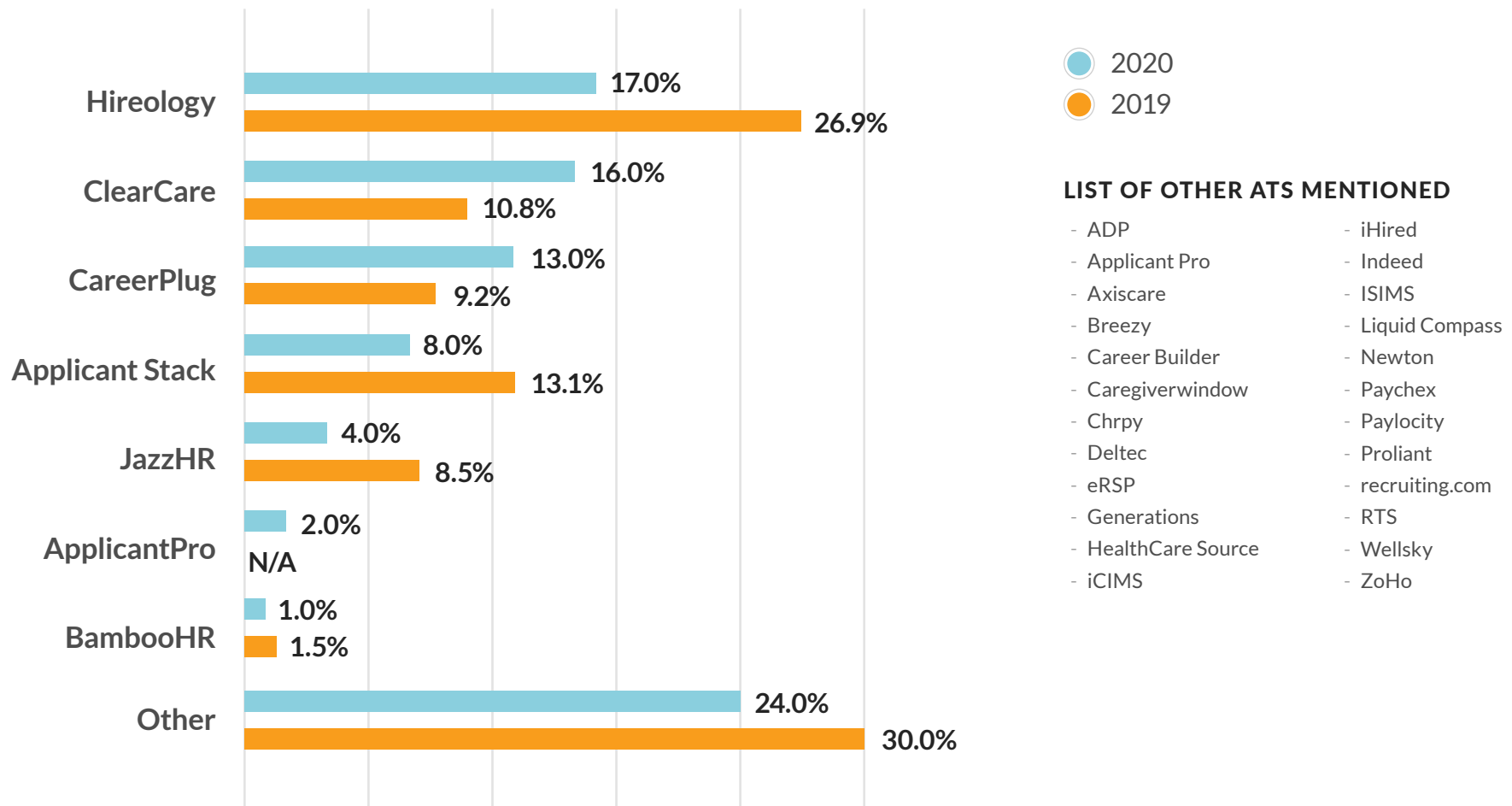
LIST OF OTHER REVIEW MANAGER PROGRAMS

- BirdEye
- Choice Local
- corecubed MOST
- Gather Up/Google
- Marketing 360
- Oggvo
- Paytime
- Pulse360
- Qiigo
- Rallio
- SignPost
- Silent Freeway
- Smarty Pantz Marketing
- We Care Connect



APPLICANT TRACKING SYSTEM (ATS)

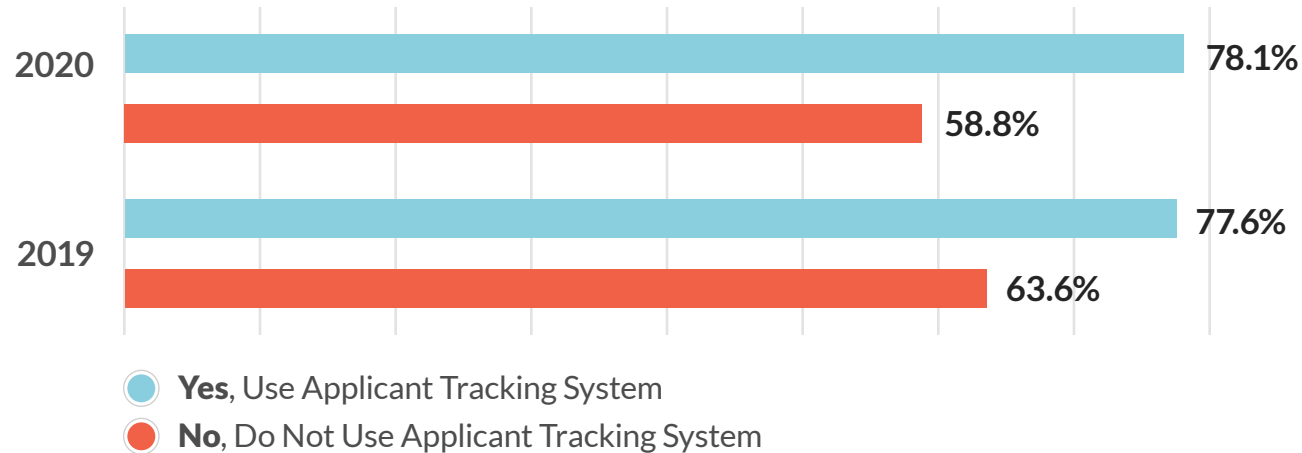
6.4 Applicant Tracking Systems (ATS) Used by Home Care Providers in 2020





APPLICANT TRACKING SYSTEM (ATS)

6.5 Providers that Use an Applicant Tracking System - Caregiver Turnover



Beyond the Data

An Applicant Tracking System (ATS) should not be confused with a job listing site. An ATS is a software program, typically cloud-based, that allows hiring managers to post job ads, manage applicants, and oversee each part of the hiring process from a single platform. Because ATS platforms typically optimize for the lowest cost-per-hire and focus on providing a high volume of applicants, they may lead to higher turnover while still providing powerful hiring resources.

We believe this statistic illustrates the need for 1) hiring managers to be more selective in choosing candidates from an ATS pipeline, and 2) ATS providers to acknowledge the need to track turnover rates based on recruitment channels and facilitate better ways for hiring managers to incorporate this factor into their selection of said channels.

APPLICANT TRACKING SYSTEM (ATS)

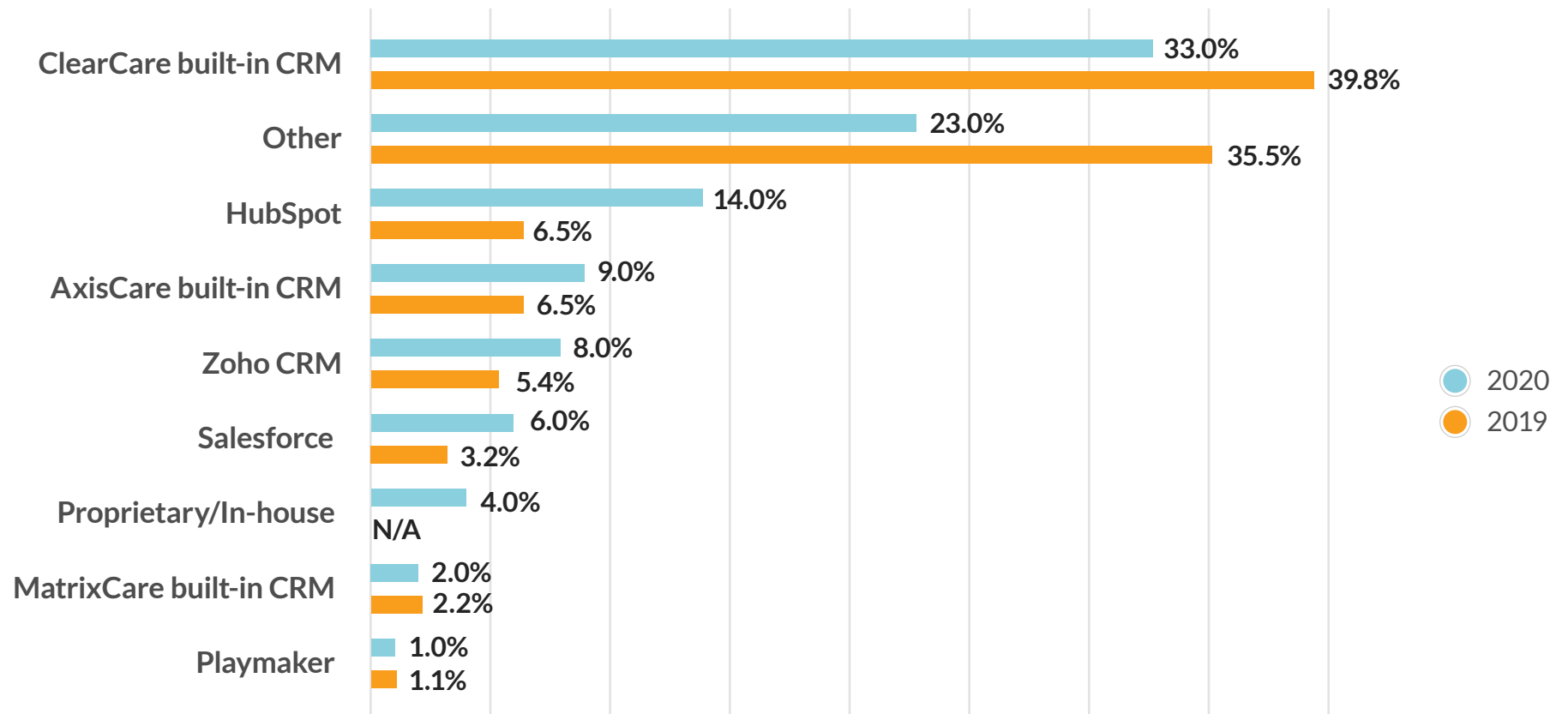
6.6 2020 Applicant Tracking System (ATS) Outcomes

ATS Use	Median Caregiver Acquisition Cost	Median Caregiver Applicants	Median Caregivers Hired	Caregiver Turnover
Use ATS	\$533	500	77	78.1%
Do Not Use ATS	\$511	223	56	58.8%



CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

6.7 Customer Relationship Management (CRM) System Used by Providers in 2020



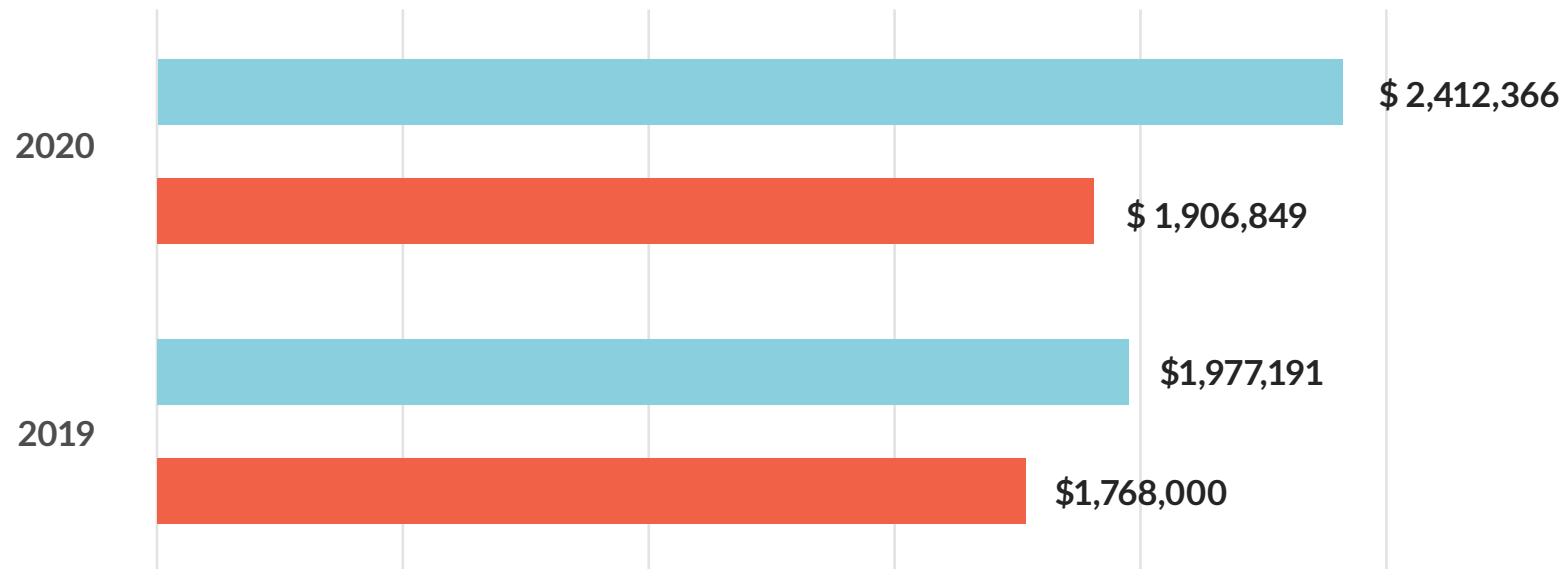
LIST OF OTHER MENTIONED

- Act!
- Approved Senior Network
- ASN
- Assuricare
- Care+
- CareWhen
- Enquire
- eRSP by Kaleida Systems
- FranchiseSoft
- Home Care S52 CRM
- Kantime
- Less Annoying CRM
- Map My Customers
- Monday.com
- myUnity
- Nimble
- Nutshell
- SEOSamba
- SMARTcare



CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

6.8 Providers that Use a Customer Relationship Management (CRM) System - Median Revenue



- **Yes**, Use Customer Relationship Manager
- **No**, Do Not Use Customer Relationship Manager

Beyond the Data

A CRM system is a software system that allows home care agencies to track and automate communications with clients, potential clients, and referral sources in order to help office teams work more efficiently and maintain better records.

Agencies that use a CRM enjoy a strong advantage in marketing and sales that allows them to get more done in less time and prevent inquiries from slipping through the cracks.



ARTICLE

The Rise of Hospital at Home

**Brady Murphy**VP, Sales & Marketing | **AlayaCare**

Ravaged hospitals. Overrun intensive care units. Front-line workers facing burnout from what must seem like an endless stream of impossible days—yet they continue to persevere as the COVID-19 crisis continues.

With all the attention on the coronavirus, it is easy to overlook the many chronic diseases that were plaguing the system before the pandemic began. These diseases, of course, are still present; for families and their health-care teams, it has just become more challenging to manage them.

We are waging battles on multiple fronts—and, like battles before this, our hospitals, governments, and home care industry have tried to step up to provide solutions. In overlapping efforts to compensate for the incredible events of the past 10 months, they have ramped up PPE production, pivoted to new models of care, and accelerated technology, all in an effort to increase efficiency, safety – and generate better outcomes.

Accelerated production of PPE and flex care solutions

While the overall response to COVID has been uneven, to put it one way, there has been a strong push at many levels to bolster PPE production (an acronym everyone now understands), increase hospital ward capacity, and encourage thinking outside the box when it comes to patient care.

The Centers for Medicare & Medicaid Services (CMS), for instance, announced a [new strategy](#) to add flexibility to the U.S. health-care system

outside traditional hospital settings. Alongside expanded telehealth options and updated rules for ambulatory surgical centers to perform more inpatient procedures was a new [Acute Hospital Care at Home](#) initiative.

This program, expanding on the [Hospitals Without Walls](#) effort from last spring, allows for qualified hospitals and health-care institutions to provide safe hospital care for eligible patients inside the home. Patients cared for at home in this model are those who were recently in an emergency department or in an inpatient hospital bed. It blends remote and in-person visits by registered nurses and integrated health paramedics, tied back to an individual's care plan.

These efforts have proven vital to dramatically boost the nation's capacity to deal with a broader spectrum of chronic health issues such as cancer, diabetes, metabolic disease, heart disease, and chronic obstructive pulmonary disease—and manage the deep impact these issues have on families and on the system at large.

The new venue for the future of care: at home

Today, physicians, nurses, therapists, and aides are visiting these patients far more frequently in their homes than in a clinical care setting. It has been a necessary and rapid change forced by the pandemic to safeguard hospital capacity. Yet, we expect this shift to remain long after COVID-19 fades into the awful memory (and learning opportunity) it will become.



That is because the future of health care is in the home; indeed, research shows that home care can be as or more effective than hospital-based care. This was the case well before COVID-19 as hospital-at-home programs have proven successful at improving patient outcomes while reducing health care costs (as evidenced in [the 2012 Johns Hopkins study](#)). Yet, in parallel with this shift to the home, it is now more important than ever to empower family caregivers with the training, knowledge, and equipment to keep patients safe.

Fortunately, that is exactly what programs like Acute Hospital Care at Home are designed to do, and our industry is fortunate to have leaders like [Dr. Bruce Leff](#) who deserves his reputation as a founding father of this virtual hospital concept and as a promoter of more comprehensive, patient-centered care.

Importantly, the new hospital-at-home care program sets it up to be realistically successful, as some of the conditions in this [FAQ document](#) reveal. It advises that physicians or nurses should lead care and orient others in a person's circle of care to the plan in place. And it correctly points out that many different types of care are needed to meet a person's needs: from nursing, wound care, and home infusion, to physio and occupational therapy, social work, and personal care. It is pragmatic in guiding that delegated authority and care coaching are needed to relieve burden from family caregivers, and that virtual care and remote monitoring are necessary in managing care plans in order to avoid return trips to the hospital.

Technology's role in the hospital-at-home movement

We know that for any innovative systems of care to be successful, they must deliver a care experience that is at least on par with what patients would find at the hospital. Technology is the conduit through which these evolutions can work effectively.

The following software areas are prime for ensuring continuity of care while keeping clients and care professionals safe:

Mobile technology: Care workers must operate with maximum flexibility and be able to access data and clinical documentation, even in offline mode. [Mobile apps](#) are best designed as relevant to each individual worker's role—reflecting, for instance, the appropriate tasks for nursing, various types of therapy, home infusion and personal care, as well as including even social or behavioral interventions.

Remote patient monitoring: Whether a user inputs their information, or whether it is automatically captured via a bluetooth device or wearable patch, these indicators of a client's real-time health status are singularly important to the success of any care plan. [Remote patient monitoring](#) is evolving as we speak.

Real-time connectivity: In the hospital-at-home model, there is, of course, no nurse station to visit. Yet, here, technology can significantly close the gap by bringing clients into a virtual ward where two-way dialogue is possible between care professionals and the clients they serve.

Virtual visits: In 2020, we witnessed the rise of virtual care in swift fashion out of immediate necessity. Physicians in many disciplines now, beginning with primary care and extending to specialist care, have made this a new normal. [Virtual care](#) has also made great strides within the home and community care space as well.

Home Infusion: For various clients incapable or unwilling to visit the hospital, home infusion is a viable option—and it can now [be done virtually](#). (Clinics can learn best practices from providers such as [Option Care Health](#).)

Interoperability/Integrations: Because Acute Hospital Care at Home is a waiver program tied to a hospital or health system, the expectation is that more than one software system will require integrations. Modern technologies rely upon [APIs](#) to enable a best-of-breed experience. A single hospital EMR is highly unlikely to support enough use cases to work stand-alone as much as the hospital-at-home solution.

Care delivery and reimbursement options for progressive agencies

Again, the distinction between the hospital-at-home scenario and home care industry is important. Key differences include the following:

- There is no OASIS requirement.
- The care is often for chronic illnesses or care that requires home infusions and therefore isn't episodic.
- The care is not part of a Medicaid personal care waiver program with 15-minute increment billing units.

This care delivery is meant to mirror the experience of a hospital setting; therefore, a home care agency looking to enter this space is more likely to follow their private duty line of business reimbursement method. In some cases, however, the relationship between agencies and hospitals is more tightly integrated and aligned in the form of risk/performance-oriented contracts. These agreements share both risk and reward of care plan goals—beyond authorization dollar limits or reaping bonuses for completing care on time and on budget. 🏠



ABOUT THE AUTHOR

Brady Murphy is an accomplished marketer, speaker, and entrepreneur. He has been part of two exists of start-ups in the technology field. The first startup brought to marketers the world of mobile marketing. His company was one of the first mobile marketing agencies to emerge in the digital boom in the early 2000s. The second startup was a pioneering software company to bring mobility to workforce management. Today, Brady oversees sales and marketing of AlayaCare.

ABOUT ALAYACARE

AlayaCare, founded in 2014, is a provider of revolutionary cloud-based home care software. Its end-to-end solution spanning clinical documentation, back office functionality, client and family portals, remote patient monitoring, and a mobile care worker app offers agencies a platform to drive innovation and bring home care into the future.

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The Client/Caregiver Experience

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SUMMARY

THE CLIENT & CAREGIVER EXPERIENCE

The client experience is the interaction and relationship your business develops with each client and is impacted by each touch point and person who enters your clients' lives. This includes your management team, office staff, and, especially, the caregivers.

Much of the information in this section is taken from Home Care Pulse's Satisfaction Management Program, where each month we conduct over 15,000 live, telephone surveys with clients and caregivers of home care providers. This section is designed to introduce you to the client experience and how you can improve their experience with your home care business, thereby improving their quality of living.





IMPACT OF EXPERIENCE MANAGEMENT & ONLINE CAREGIVER TRAINING

Agencies that use Home Care Pulse...

17%

Generate 17% more in annual revenue

53.3%

Hired 53.3% more caregivers in 2020

48.6%

Client Average Lifetime Value is 48.6% higher

22%

Retain clients 22% longer

Agencies that actively manage client/caregiver experience have a stronger foundation for long-term growth.

These agencies receive more referrals from their clients, keep clients longer, and earn more revenue because they compete on value, not price. They also attract more caregiver applicants and retain their caregivers longer.



877.307.8573

info@homecarepulse.com

Improve Client/Caregiver Experience to Drive Long-Term Growth

Improving your client/caregiver experience affects every part of your business. Get the tools you need to actively manage client/caregiver experience and accomplish your business goals.

On the next page, learn how Norwood Seniors Network in Chicago keeps their annual caregiver turnover under 30% using experience management.

What does our Experience Management Program help you do?

-  Survey your clients and caregivers to capture unbiased feedback and satisfaction scores.
-  Access an online dashboard to view feedback and compare your scores against competition and track trends over time.
-  Automatically generate online reviews from client feedback to attract new leads.
-  Identify who your client promoters are and progress in turning more clients into promoters.
-  Become eligible to qualify for Best of Home Care awards.



EXPERIENCE MANAGEMENT CASE STUDY

How Norwood Seniors Network Keeps Caregiver Turnover Under 30% Using Home Care Pulse's Caregiver Surveys

In an industry where the median turnover rate has exceeded 60% for over five years now, any agency with sub-30% turnover has a story to tell.

Norwood Seniors Network is a highly successful independent home care agency providing a suite of services aimed at providing everything seniors need to stay at home and thrive.

Norwood's Executive Director Laura Shaw-deBruin, a seasoned professional with decades of experience in home care and other care settings, doesn't beat around the bush.

"It's not overstating to say that our ability to consistently keep turnover under 30% is a direct result of using Home Care Pulse surveys to seek and act on caregiver feedback," she says.

Norwood Seniors Network has been using Home Care Pulse to conduct monthly client/caregiver experience surveys for years, and the feedback from those surveys has been instrumental in fine-tuning the business to make it a place where caregivers want to stay.

"Our caregivers will tell you: they stay because we listen to them," says Laura. We care what they're saying and we'll always implement changes if they think changes are needed.

"There's not one magic pill to retention," says Laura. It's hitting on a bunch of different things. It takes consistency and it takes understanding all the pieces to the puzzle.

"You have to learn what all those pieces are by listening; then the key is follow-up. Collecting this feedback isn't going to do you any good unless you act on it. *[Home Care Pulse surveys] only help if you're willing to not only take the feedback but to act on it.*"

Where Most Agencies Go Wrong

A lot of agencies try to get client/caregiver feedback to make sure everything's on the up-and-up. Laura says, "Most of them struggle to gather accurate, unbiased feedback or fail to follow up on it consistently."

"You need to know the good, the bad, and the ugly about your business," explains Laura. In any relationship, nothing is perfect and everyone is fallible. That includes your relationship with your employees.

Norwood Seniors Network
Reshaping Aging®

Norwood Seniors Network
Chicago, IL

"Some agency owners might say, 'I don't need to know about the bad and the ugly in my business because it doesn't have the bad or the ugly.'

"I say: How do you know you're doing so well? How are you measuring that?"

"If you're trying to learn hard truths about your business, you need someone else to measure your success."

The Importance of Third-Party Feedback

Why is a third party important, according to Laura?

"Companies need to do what they do well. I do home care well. I'm not a satisfaction survey company. If you want the best results, you go to the people who can do it the best. When it's not unicorns and rainbows, people can have a hard time telling the truth to your face. That's why I trust Home Care Pulse.

"A third-party gives you an unbiased, nonjudgmental, accurate score. The interviewers are trained in what they're asking and can keep consistency. If you do it on your own, it's costing you somebody's time and salary.

"A chunk of our revenue is tied to having a third-party doing the surveys, because families and caregivers appreciate that we are paying for a third-party company to measure their satisfaction. That's a huge deal to them." ■





CLIENT SATISFACTION

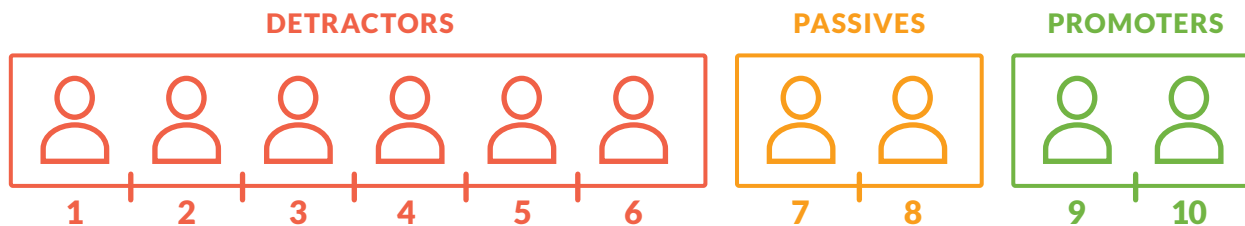
7.1 Net Promoter Score® (NPS) Calculations

Net Promoter Score® is based on one question:

“How likely are you to recommend [company name] to others?”

It is rated on a scale of 1-10, 10 being “highly likely to recommend”.

Based upon the answer clients provide, they are categorized into three groups:



1. Promoters (score 9-10) are loyal enthusiasts who will keep using your services and refer others, fueling growth.

2. Passives (score 7-8) are satisfied but unenthusiastic clients who are vulnerable to competitive offerings.

3. Detractors (score 1-6) are unhappy clients who can damage your brand and impede growth through negative word-of-mouth.

How do I use Net Promoter Score?

A Net Promoter Score isn't the end goal in and of itself—client growth and satisfaction is. Using NPS to track your progress helps you identify whether you're truly making progress at improving the experience you provide to your clients.

NPS won't help you much if you occasionally check it; you need to track it closely, gather feedback as to why clients give the answers they do, and use it to power decisions. The most successful agencies are those that track trends over time and use this data to influence decisions, including compensating their caregivers based on client satisfaction scores.

If you would like to see how your Net Promoter Score® compares to that of the industry, contact Home Care Pulse at info@homecarepulse.com or 877.307.8573.

® Net Promoter Score and NPS are Registered Trademarks for Bain & Company, Fred Reichheld and Satmetrix Systems, Inc.

NPS Calculation

To calculate your Net Promoter Score, take the percentage of clients who are promoters and subtract the percentage who are detractors.



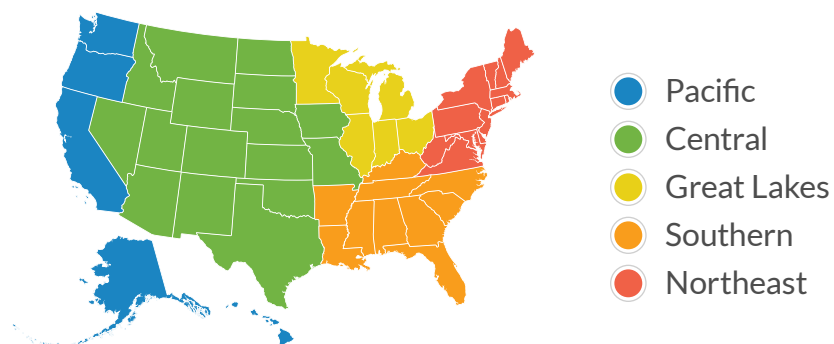


CLIENT SATISFACTION

7.2 Client Net Promoter Score® (NPS) Breakdown - Geographic Region & Industry

2020	Pacific	Central	Great Lakes	Southern	Northeast	Industry
Detractor (1-6)	7%	6%	7%	7%	6%	7%
Passive (7-8)	21%	19%	21%	18%	19%	19%
Promoter (9 -10)	72%	74%	73%	75%	75%	74%
Net Promoter Score	6.5	6.8	6.6	6.7	6.8	6.7

This data was taken from Home Care Pulse Experience Management Program with over 96,949 client satisfaction surveys conducted in 2020.

**Why is Net Promoter Score important?**

Companies with high Net Promoter Scores grow at more than twice the rate of their competitors on average. ¹Achieving and maintaining a high NPS can help you to turn your clients into your marketing department by ensuring that they're promoters. It also helps you keep your services top-notch and facilitate growth and referrals.

Using NPS allows you to segment your clients into promoters, passives, and detractors so you know who to approach for referrals, who needs a little extra "wow" factor, and who is vulnerable to leaving your services.

See how your Net Promoter Score® compares to the industry. Talk with a client/caregiver experience expert at info@homecarepulse.com or 877.307.8573.

<http://www.netpromotersystem.com/about/how-is-nps-related-to-growth.aspx>

1



CLIENT SATISFACTION

7.3 Overall Client Satisfaction - Historical



2020 Overall Satisfaction

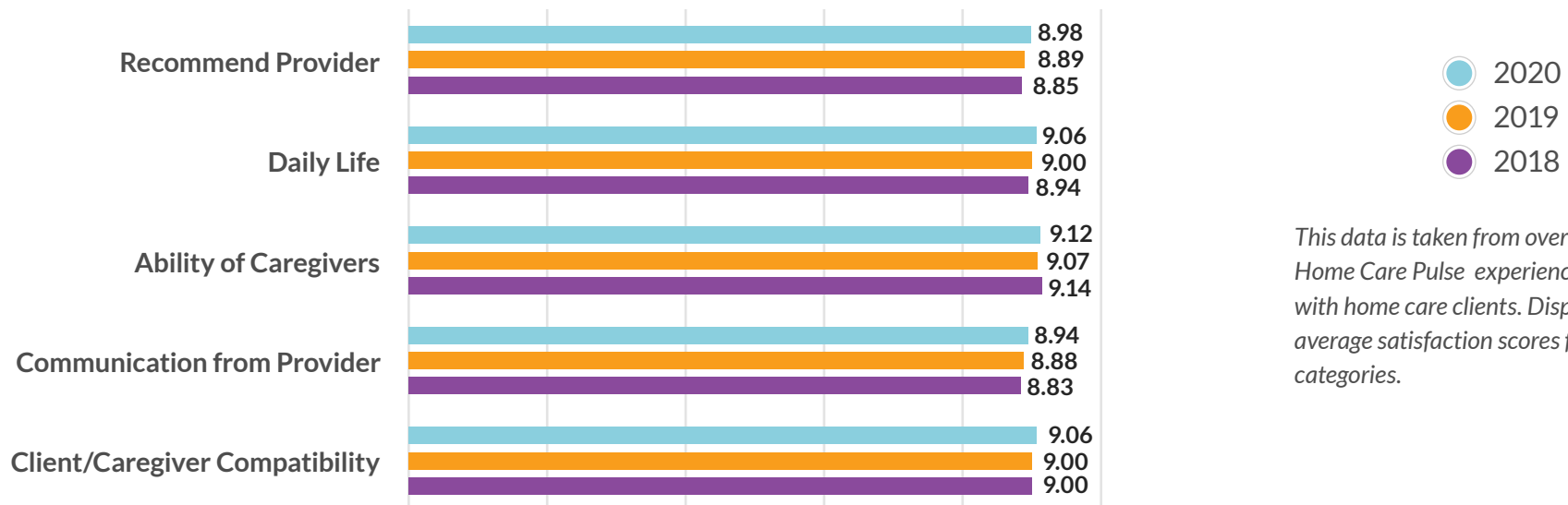
9.03

Overall Satisfaction (OSAT) takes the average score of all rated questions in the Home Care Pulse Experience Survey. This metric is particularly useful for measuring satisfaction after a specific change or event.

This data is taken from over 96,949 Home Care Pulse Experience Surveys with home care clients in 2020.

CLIENT SATISFACTION

7.4 Historical Industry Average Client Satisfaction Scores - Category



This data is taken from over 96,949 Home Care Pulse experience surveys with home care clients. Displayed are the average satisfaction scores for the rated categories.



CAREGIVER SATISFACTION

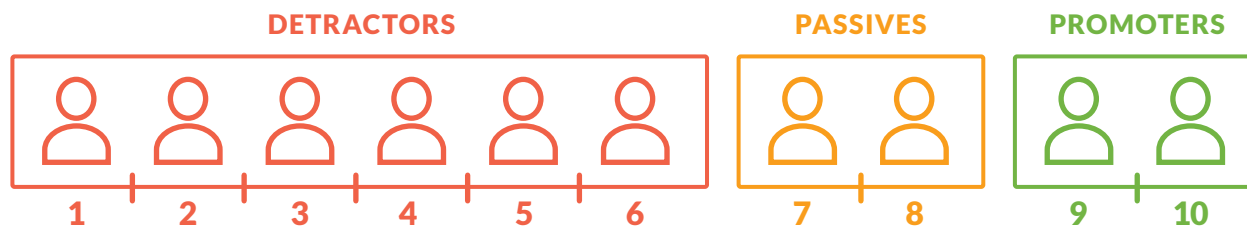
7.5 Employer Net Promoter Score (eNPS) Calculations

Caregiver Engagement Score is based on one question:

“How likely are you to recommend [company name] to others?”

It is rated on a scale of 1-10, 10 being “highly likely to recommend”.

Based upon the answer value caregivers provide, they are broken into three groups:



1. Promoters (score 9-10) are loyal enthusiasts who will continue working for you business and refer others, fueling more caregiver referrals.

2. Passives (score 7-8) are satisfied but unenthusiastic caregivers who are vulnerable to competitive offerings.

3. Detractors (score 1-6) are unhappy caregivers who can damage your brand and impede growth through negative word-of-mouth.

Why is Caregiver Engagement Score important?

As long as the caregiver shortage continues, CES will be particularly important because it can help you measure and improve your ability to recruit new caregivers through your existing caregivers.

Caregiver Engagement Score helps you generate more employee referrals by tracking how well current efforts and new initiatives are working to make caregivers more likely to refer others.

Caregivers recruited through existing caregivers typically have the lowest turnover rates of any recruitment source.

If you would like to find out how your Caregiver Engagement Score compares to that of the industry, contact Home Care Pulse at info@homecarepulse.com or 877.307.8573.

CES Calculation

To calculate your Caregiver Engagement Score, take the percentage of caregivers who are promoters and subtract the percentage who are detractors.

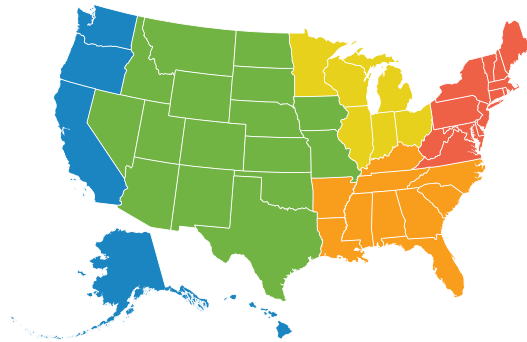
$$\begin{array}{ccc} \text{\% of Promoters} & - & \text{\% of Detractors} & = & \text{Caregiver Engagement Score} \\ \text{Ex: 70\%} & & \text{Ex: 20\%} & & \text{Ex: 50\% or 5.0} \end{array}$$



CAREGIVER SATISFACTION

7.6 Caregiver Engagement Score (CES) Breakdown - Geographic Region & Overall

2019	Pacific	Central	Great Lakes	Southern	Northeast	Overall
Detractor (1-6)	5%	5%	4%	5%	5%	5%
Passive (7-8)	21%	20%	19%	20%	20%	20%
Promoter (9-10)	74%	75%	76%	76%	76%	76%
Net Promoter Score	6.9	7.0	7.1	7.2	7.0	7.1



- Pacific
- Central
- Great Lakes
- Southern
- Northeast

This data was taken from Home Care Pulse Satisfaction Management Program with over 73,335 caregiver Experience Surveys conducted in 2020.

If you would like to see how your Caregiver Engagement Score compares to that of the industry, contact Home Care Pulse at info@homecarepulse.com or 877.307.8573.



CAREGIVER SATISFACTION

7.7 Overall Caregiver Satisfaction - Historical



2020 Overall Satisfaction

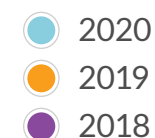
9.12

Overall Satisfaction (OSAT) takes the average score of all rated questions in the Home Care Pulse Experience Survey. This metric is particularly useful for measuring satisfaction after a specific change or event.

This data is taken from over 73,335 Home Care Pulse satisfaction surveys with caregivers in 2020.

CAREGIVER SATISFACTION

7.8 Historical Industry Average Caregiver Satisfaction Scores - Category



This data is taken from over 73,335 Home Care Pulse satisfaction surveys with caregivers. Displayed are the average satisfaction scores for the rated categories.



EXPERIENCE MANAGEMENT CASE STUDY

LIFETIME Care at Home Uses Client/Caregiver Satisfaction to Motivate Office Staff



LIFETIME Care at Home
Guilford, CT

One of the most important elements of success for any agency leadership is to get their staff fully invested in the vision of the company.

Some home care agency owners/administrators are successful at this; however, many struggle to get their staff as invested as they are in making sure clients and caregivers are receiving an unforgettable experience.

LIFETIME Care at Home has found that by using measurable client/caregiver satisfaction (gathered in Home Care Pulse's monthly client/caregiver surveys) as a North Star and holding staff accountable to the numbers, they just might have cracked the code on staff engagement.

“The satisfaction piece of this work needs to be used as a driver. The financial benefits will follow.”

“You’ve got to be in home care for the passion and compassion,” says Guy Tommasi, owner managing director of LIFETIME Care at Home. “If taking great care of people isn’t your driver, you lose your edge. . . . The satisfaction piece of this work needs to be used as a driver. The financial benefits will follow.”

Guy’s point is that while revenue, profits, and operations are necessary and extremely important, at the end of the day it’s client satisfaction that should bring the most

fulfilment to home care professionals. “Measuring client/caregiver satisfaction using Home Care Pulse is the key to getting my admin team to do their best work,” he says.

“They are each responsible for an area of the report. . . . They have ownership in that.”

Guy discusses how the data provides accountability and motivation for his staff:

“When our monthly surveys from Home Care Pulse come out, my staff knows that the following week, it will be discussed at our staff meeting. They are each responsible for an area of the report. If they’re below a 9 [out of 10], they need to be prepared with an answer of what we need to do to improve it. It’s an approach that’s made us better providers and employers.

“We post the results in our conference room. My staff sees those numbers go up, and they have ownership in that. It forces them to address it on their own terms. The motivation is moving the score from an 8 to a 9.

“They’ll go and talk to clients on their own to find out what we need to do differently. Is there something we didn’t do to address that personal need? It’s all focused on improvement.”

“We’ll win every time.”

“We’ll sit and discuss it in our meetings. The staff member [responsible for the metric in question] will have ideas, but everybody else around the table will jump in with ideas too.”

Their results speak for themselves. In addition to consistent revenue growth and improved caregiver turnover, they’ve doubled the length of time that clients stay with their agency, and they continue to see strong revenue growth year-to-year.

“When it’s all said and done, customer service is what tilts the scale,” says Guy. “If we’re able to provide exceptional customer service, we’ll win every time. And the way we know we’re winning or not is by the results we’re seeing in our surveys from Home Care Pulse. A third party is asking the questions we want asked and finding out what we can do better.” ■

“When it’s all said and done, customer service is what tilts the scale.”

Guy Tommasi

Owner
LIFETIME Care at Home



EXPERIENCE MANAGEMENT

Care Smarter.

Measure and improve both the client and the caregiver experience, boost retention, and gather proof of quality.

Watch 2-Minute Demo

homecarepulse.com/surveys/instant-demo/



Best of Home Care

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SUMMARY

BEST OF HOME CARE

In this section, you will find all things pertaining to the Best of Home Care® Awards, a listing of all the award-winning home care providers of the 2021 Best of Home Care Awards. The awards given are Employer of Choice, Provider of Choice, and Leader in Excellence, the latter being the most prestigious award given to those providers who received top ratings from both their clients and caregivers.





ENDORSED NATIONAL PROVIDER



2021 Home Care Pulse Endorsed National Provider

The **Home Care Pulse Endorsed National Provider Certification** is given to franchises or membership networks that demonstrate their commitment to quality by having at least 10% of their locations participate in the Home Care Pulse Satisfaction Management Program.



Years Endorsed: 9
HQ: Bryn Mawr, PA
Founded: 1992



Years Endorsed: 9
HQ: Greenwood Village, CO
Founded: 1976



Years Endorsed: 9
HQ: Incline Village, NV
Founded: 1994



Years Endorsed: 9
HQ: San Francisco, CA
Founded: 2003



Years Endorsed: 8
HQ: Gilbert, AZ
Founded: 2001



Years Endorsed: 6
HQ: Moorestown, NJ
Founded: 1975



Years Endorsed: 6
HQ: Gurnee, IL
Founded: 2002



Years Endorsed: 6
HQ: Omaha, NE
Founded: 1995



Years Endorsed: 5
HQ: Cincinnati, OH
Founded: 1997



Years Endorsed: 2
HQ: Nampa, ID
Founded: 2006



Years Endorsed: 1
HQ: Roseville, CA
Founded: 1996



Years Endorsed: 1
HQ: Burkburnett, TX
Founded: 2002



ENDORSED NATIONAL PROVIDER



2021 Best of Home Care® Endorsed National Provider*

The **Best of Home Care Endorsed National Provider Award** is given to franchises or membership networks that have at least 10% of their locations participate in the Home Care Pulse Satisfaction Management Program with 60% of those locations earning Best of Home Care awards. Best of Home Care Endorsed National Providers are industry-leading brands that demonstrate the highest quality of care available.

*As of April 2021



Years Awarded: 9
 Leader in Excellence: **67**
 Provider of Choice: **114**
 Employer of Choice: **105**
 Grand Total: **286**



Years Awarded: 9
 Leader in Excellence: **10**
 Provider of Choice: **16**
 Employer of Choice: **20**
 Grand Total: **46**



Years Awarded: 8
 Leader in Excellence: **6**
 Provider of Choice: **12**
 Employer of Choice: **16**
 Grand Total: **34**



Years Awarded: 8
 Leader in Excellence: **3**
 Provider of Choice: **10**
 Employer of Choice: **9**
 Grand Total: **22**



Years Awarded: 7
 Leader in Excellence: **12**
 Provider of Choice: **62**
 Employer of Choice: **22**
 Grand Total: **96**



Years Awarded: 5
 Provider of Choice: **101**
 Grand Total: **101**



Years Awarded: 5
 Leader in Excellence: **34**
 Provider of Choice: **115**
 Employer of Choice: **88**
 Grand Total: **237**



Years Awarded: 5
 Leader in Excellence: **2**
 Provider of Choice: **62**
 Employer of Choice: **19**
 Grand Total: **93**



Years Awarded: 5
 Leader in Excellence: **29**
 Provider of Choice: **38**
 Employer of Choice: **49**
 Grand Total: **116**



BEST OF HOME CARE® AWARD REQUIREMENTS



Criteria for the 2021 Best of Home Care® Awards



2021 Requirements

- Be a Home Care Pulse Certified – Trusted Provider for at least 12 consecutive months.
- Earn both the Provider of Choice and Employer of Choice Awards for the same time period.
- Be a Best of Home Care Award-winning provider in six or more client and caregiver satisfaction categories within in your geographic region during the previous 12 consecutive months.
- Complete a minimum of two client and two caregiver satisfaction surveys per month during the previous 12 months.



2021 Requirements

- Be a Home Care Pulse Certified – Trusted Provider for at least six consecutive months.
- Have a minimum of 10% of active clients surveyed on a monthly basis, or a qualifying Home Care Pulse survey package.
- Qualify above the 50th percentile in two or more client satisfaction categories within in your geographic region.



2021 Requirements

- Be a Home Care Pulse Certified – Trusted Provider for at least six consecutive months.
- Have a minimum of 10% of active caregivers surveyed on a monthly basis, or a qualifying Home Care Pulse survey package.
- Qualify above the 50th percentile in two or more caregiver satisfaction categories within in your geographic region.



Key Statistics from the 2021 Best of Home Care® Leader in Excellence

Total Leader in Excellence
Award-Winning locations:

284



Number of agencies
that have earned 5 or
more years in a row:

29

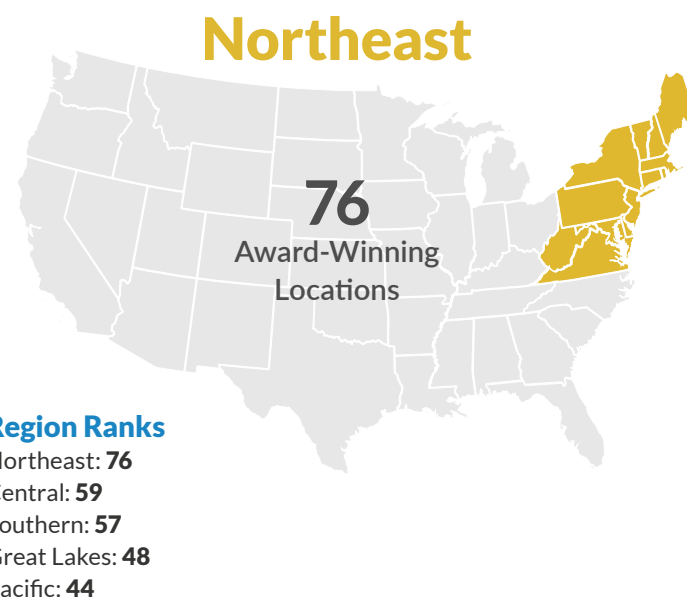
State with the most Leader in
Excellence award-winning providers:



Top 5 States

California: **33**
Texas: **22**
Florida: **17**
Pennsylvania: **15**
Arizona/Illinois: **13**

Regions with the most Leader in Excellence
award-winning providers:



First-time award-winning
locations in 2021:

99

Number of repeat award-winning
locations: *(from last year)*

162



LEADER IN EXCELLENCE



Best of Home Care® Leader in Excellence

The title of Leader in Excellence is awarded to the few home care businesses that set the highest standard for quality in home care, receiving the highest client and caregiver satisfaction scores in at least 6 of the 10 categories measured by Home Care Pulse through monthly client and caregiver interviews. This award shows current and prospective clients that these providers are dedicated to client satisfaction and excellence in home care.

Special Note: The following includes all winners as of April 2021. The 2021 Best of Home Care Award is based on 2020 performance.

UNITED STATES

ALABAMA

- Bluebird Homecare - Birmingham
- Home Care Assistance - Huntsville

ARIZONA

- ABRiO Care - Yuma
- Adultcare Assistance Homecare - Sun City
- Assisting Hands Home Care - Phoenix
- BrightStar Care - Tucson/Sierra Vista
- Catalina In-Home Services
- ComForCare - Phoenix
- Home Assist Health
- Home Care Assistance - Green Valley
- Right at Home - Tucson
- SYNERGY HomeCare - Tucson,
- Visiting Angels - East Valley
- Visiting Angels of Northern Arizona
- Visiting Angels South Phoenix / Casa Grande

ARKANSAS

- Elder Independence Home Care
- Right at Home - Hot Springs Village

- Right at Home - Metro Little Rock

CALIFORNIA

- A Quality IN Home Care
- Arosa - San Diego
- Arosa - Silicon Valley
- Assistance in Home Care
- BrightStar Care - Beverly Hills
- BrightStar Care - Huntington Beach
- BrightStar Care - Lafayette
- BrightStar Care - Lake Forest
- BrightStar Care - Roseville
- BrightStar Care - San Luis Obispo
- BrightStar Care - Santa Monica / Marina Del Rey
- Carefree Home Care
- Everlight Care
- Family Matters In-Home Care
- Home Helpers - Redding
- Home Helpers - San Mateo
- HomeLife Senior Care
- JFS Care
- Lifespan
- Mom's Home Care
- Right at Home - Burbank
- Right at Home - Cypress
- Right at Home - Fresno
- Right at Home - Palm Desert
- Right at Home - Santa Monica

- Right at Home - Tustin
- Tender Rose
- Visiting Angels - Cameron Park
- Visiting Angels - Eureka
- Visiting Angels - Fresno
- Visiting Angels - Livermore
- Visiting Angels Midtown Sacramento
- Visiting Angels of Santa Barbara

COLORADO

- HomeCare of the Rockies
- SYNERGY HomeCare - Longmont
- Visiting Angels - Grand Junction
- Visiting Angels - Pagosa Springs
- Visiting Angels - Pueblo

CONNECTICUT

- Assured Quality Home Care, LLC [ASQ]
- ComForCare - Stamford
- Franciscan Ever There Care
- LIFETIME Care at Home - Guilford
- Sheraton Caregivers - Westport
- SYNERGY HomeCare - Fairfield



LEADER IN EXCELLENCE

- Visiting Angels - Fairfield

DISTRICT OF COLUMBIA

- Right at Home - Washington, DC

DELAWARE

- Families 1st Choice Home Care

FLORIDA

- BrightStar Care - Bay County
- BrightStar Care - Delray Beach
- BrightStar Care - Kissimmee/Osceola
- BrightStar Care - North Central Broward Co.
- BrightStar Care - Tampa
- BrightStar Care of Jupiter/ Martin County
- Comfort Keepers - Hollywood
- Concierge Care of Daytona
- Concierge Care of Jacksonville
- Concierge Care of Ocala
- Concierge Care of Ponte Vedra
- Home Care Assistance of Ft. Lauderdale

- Home Care Assistance of Palm Beach County
- Life Home Health
- Masada Home Care, Inc.
- Right at Home - Englewood
- SYNERGY HomeCare - Miami

GEORGIA

- A Helping Hand Home Care
- Angels at Home
- BrightStar Care - St. Simons Island
- Caring Companions Inc.
- Comforting Arms - Kennesaw
- Georgia Living At Home; South Central Georgia Region
- Georgia Living At Home; South Georgia Region
- Kadan Homecare - Atlanta
- Visiting Angels - Brunswick
- Visiting Angels - Hoschton

IOWA

- Home Care Assistance - Des Moines

IDAHO

- Family Resource Home Care - Boise
- Visiting Angels of Eastern Idaho

ILLINOIS

- Always Best Care - Glenview
- BrightStar Care - Tinley Park
- For Papa's Sake Home Care - Arlington Heights
- Home Helpers - Bloomington
- Home Helpers - Bourbonnais
- Norwood Seniors Network
- Right at Home - Grayslake
- Right at Home - Orland Park
- Right at Home - West Dundee
- SYNERGY HomeCare - Chicago
- Visiting Angels - Crystal Lake
- Visiting Angels - Peoria
- Visiting Angels - Rockford

INDIANA

- Visiting Angels - East Central
- Visiting Angels - Fort Wayne
- Visiting Angels - Frankfort & Lafayette
- Visiting Angels - Nappanee

- Visiting Angels of Northwest Indiana

KANSAS

- Grace Home Care

KENTUCKY

- Home Helpers - London

LOUISIANA

- ComForCare Home Care - Slidell
- Right at Home - Lafayette

MAINE

- Visiting Angels - Bangor

MARYLAND

- Absolute Companion Care
- Advanced Nursing and Home Support
- BrightStar Care - Bel Air
- Home With You Senior Care
- Regent Healthcare, Inc.
- Shepherd's Staff In-home Care
- SYNERGY HomeCare

MASSACHUSETTS

- Visiting Angels - Chelmsford
- Visiting Angels - Newburyport, MA / Stratham, NH

- Visiting Angels - Worcester,
- Visiting Angels of the Berkshires

MICHIGAN

- BrightStar Care - Novi
- Gauthier Family Home Care, LLC - Grand Rapids
- Home Sweet Home In-Home Care - Battle Creek
- Home Sweet Home In-Home Care - Kalamazoo
- Homewatch CareGivers - Ann Arbor
- Visiting Angels - Great Lakes Bay
- Visiting Angels - Plymouth
- Visiting Angels - Sterling Heights
- Visiting Angels of Southwest Michigan

MINNESOTA

- BrightStar Care - St. Croix Valley
- Homewatch CareGivers - Edina
- SYNERGY HomeCare - Blaine

MISSOURI

- Compassionate Nursing Services



LEADER IN EXCELLENCE

- Good Samaritan Senior Care
- Right at Home - St. Charles
- Seniors Home Care

NEBRASKA

- Promedcare - Columbus
- Promedcare - Fremont

NEVADA

- BrightStar Care - Henderson
- BrightStar Care - W Central Las Vegas

NEW HAMPSHIRE

- BrightStar Care - Bedford/Manchester
- Live Free Home Health Care
- Right at Home - Londonderry
- Visiting Angels - Auburn
- Visiting Angels - Nashua
- Visiting Angels of Gilford

NEW JERSEY

- BrightStar Care - Wayne
- Comfort Keepers - Haddonfield
- Griswold Home Care - Passaic
- Heartfelt Home Care
- Hibernian Home Care

- Homewatch CareGivers - South Orange
- SYNERGY HomeCare of South Jersey
- The Senior Company
- Visiting Angels - Atlantic County
- Visiting Angels - Marmora
- Visiting Angels of Matawan

NEW YORK

- Alliance Homecare
- Home Helpers & Direct Link of CNY
- Right at Home - Miller Place
- Right at Home - Mount Kisco
- Seniors Helping Seniors - Watertown
- STEPS Home Care
- Touching Hearts at Home of CNY
- Touching Hearts at Home of Rochester
- Westchester Family Care

NORTH CAROLINA

- Aware Senior Care, Wake County
- Four Seasons Home Care, Hendersonville
- Griswold Home Care - Winston-Salem

- Home Careolina - Cornelius
- HomeChoice Home Care Solutions
- Right at Home - Belmont
- Right at Home - Wilimington
- Stress Free Home Care Corp.
- Visiting Angels - Charlotte
- Visiting Angels - Gastonia

OHIO

- BrightStar Care - Hudson/Solon
- Cherished Companions Home Care, LLC
- Family Bridges Home Care - Cincinnati
- Home Helpers - Lancaster
- Hummingbird Home Care
- Right at Home - Westlake
- Touching Hearts at Home - Dayton
- Visiting Angels - Cincinnati
- Visiting Angels - Mentor
- Visiting Angels - Salem
- Visiting Angels of Central Ohio

OKLAHOMA

- Home Care Assistance - Edmond
- Laura Lynn's Home Care

- Visiting Angels - Oklahoma City
- Visiting Angels of Tulsa

OREGON

- BrightStar Care - Lane County
- Caring Heart Health & Home Services, Inc.
- United Homecare Services - Coos Bay
- Visiting Angels - Gresham

PENNSYLVANIA

- A Long Term Companion
- Asbury Home Services- Erie
- Christian Standards for Christian Care
- Griswold Home Care - Northampton
- Griswold Home Care - Wilkes Barre
- Home Helpers - Pittsburgh
- Home Helpers - Walnutport
- Seniors Helping Seniors - Bucks County
- SYNERGY HomeCare - Carlisle
- Visiting Angels - Carlisle
- Visiting Angels - Havertown
- Visiting Angels - Lancaster

- Visiting Angels - Lewisburg
- Visiting Angels - Pittsburgh,
- Visiting Angels - York & Hanover

SOUTH CAROLINA

- All Hearts Homecare, LLC
- Beyond Care, LLC
- BrightStar Care - Spartanburg
- Carolina Health Care
- Right at Home - Rock Hill
- Solutions for Living at Home
- Visiting Angels - Duncan

SOUTH DAKOTA

- Kore Cares

TENNESSEE

- BrightStar Care - Chattanooga
- Care Around the Block
- Grace Givers Home Care
- Home Helpers - Signal Mountain
- Visiting Angels - Knoxville

TEXAS

- Assisting Hands of Preston Hollow
- At Your Side Home Care - The Woodlands



LEADER IN EXCELLENCE

- BrightStar Care - Flower Mound
- BrightStar Care - Friendswood
- BrightStar Care - Rio Grande Valley
- Encore Caregivers - Houston
- Griswold Home Care - Houston
- Home Care Assistance - Fort Worth
- Home Care Assistance - Rockwall
- Home Care Assistance of North Houston
- Homewatch CareGivers - El Paso
- Homewatch CareGivers of Houston Galleria
- Montebello Home Care - Beaumont
- Right at Home - Dallas
- Right at Home - Galveston
- Right at Home - Midlothian
- Right at Home - Round Rock
- SureCare At Home
- SYNERGY HomeCare - Lubbock
- SYNERGY HomeCare of Greater San Antonio

- Visiting Angels - Southeast Central Texas
- Visiting Angels of HEB

UTAH

- BrightStar Care - Mountainside
- Danville Support Services
- Visiting Angels of Davis/Weber
- Visiting Angels of Salt Lake City

VIRGINIA

- Homewatch Caregivers of Loudoun
- Moon River Senior Care and Transportation
- Old Dominion Home Care
- Paragon Home Care
- Seniorcorp - Virginia Beach
- SYNERGY HomeCare - Arlington/Alexandria
- Visiting Angels - Lynchburg
- Visiting Angels - Manassas
- Visiting Angels - Midlothian
- Visiting Angels - Newport News
- Visiting Angels - Roanoke

WASHINGTON

- Always Best Care Senior Services of Tacoma/Gig Harbor

- Family Resource Home Care - Seattle
- Family Resource Home Care - Tri-Cities
- Home Care Solutions
- Right at Home - Seattle

WEST VIRGINIA

- BrightStar Care - The Mid-Ohio Valley
- Visiting Angels - Charleston
- Visiting Angels - Wheeling

WISCONSIN

- At Your Service Inc.
- BrightStar Care - Baraboo
- BrightStar Care - La Crosse
- Home Care Assistance - Oshkosh & Appleton
- Home Helpers - Oconomowoc
- Home Helpers of Greater Milwaukee
- Right at Home - Germantown



5 Years - Best of Home Care® Leader in Excellence

The following agencies have received the distinguished status of qualifying as a new winner for the Best of Home Care Leader in Excellence award for 5 consecutive years (2017-2021).

- BrightStar Care - AZ - Tucson/Sierra Vista
- BrightStar Care - GA - St. Simons Island
- BrightStar Care - IL - Tinley Park
- BrightStar Care of Jupiter/Martin County
- Catalina In-Home Services
- Right at Home - Dallas, TX
- Right at Home - Fresno, CA
- Right at Home - Galveston, TX
- Right at Home - Grayslake, IL
- Right at Home - Hot Springs Village, AR
- Right at Home - Palm Desert, CA
- Right at Home - St. Charles, MO
- Seniors Helping Seniors - Bucks County, PA



LEADER IN EXCELLENCE CASE STUDY

SYNERGY of Carlisle, PA: From “What’s a Caregiver?” to 7-Time Leader in Excellence

When Michelle Lisk realized her family needed another source of income to pay for her kids’ college, she told her husband she was thinking of becoming a caregiver.

“A caregiver? What’s that?” her husband responded.

A few days and a lot of research later, her husband came to her. “How would you feel about running your own home care agency instead?” he asked.

Starting an agency wasn’t easy, but Michelle learned the ropes and her SYNERGY franchise quickly became an exceptional source of home care in the area. Almost seven years later, her agency is a seven-time Best of Home Care – Leader in Excellence award winner with nearly 200 clients and caregivers.

A Laser Focus on Improvement

Asked about the secrets to her success, Michelle always brings it back to listening to clients and caregivers and then acting to make continual improvements.

“Most of our referrals are word of mouth. . . . Probably 45-50% of them ask about our awards.”



Michelle Lisk

Owner

SYNERGY HomeCare of Carlisle, PA

Early on, however, she recognized that making regular quality calls to clients and soliciting feedback from caregivers on her own wasn’t enough. These processes weren’t consistent or organized enough, and many clients and caregivers were often reluctant to speak their mind. She contracted with Home Care Pulse to survey her clients and caregivers as an independent party and turn their feedback into reports she could use to power improvement.

“I love the feedback I’m getting,” Michelle says. “The data you get with Home Care Pulse is just great in helping you run your business and improve your overall quality for clients as well as your retention with caregivers.”

She’s found that by involving her staff, she’s made the reports and data from Home Care Pulse even more effective—by letting different staff members with different priorities and areas of expertise look at them, they’re able to provide additional perspectives on how to leverage the feedback to create meaningful change.

“We just want to keep improving,” says Michelle.

An Award-Winning Agency

Gathering client and caregiver feedback through Home Care Pulse also makes Michelle’s agency eligible to receive Best of Home Care awards based on their satisfaction scores—and they’ve achieved such high satisfaction scores that they’ve won Leader in Excellence seven years in a row.



These awards have a powerful impact on marketing: “Most of our referrals are word of mouth, followed by the Internet. Probably 45-50% of them ask about our awards. It’s the family members who are out there searching online and [the award piques their interest].”

Michelle isn’t shy about the exceptional steps her agency has taken to become a great place for clients and caregivers.

“When they see that we’re a Leader in Excellence for four years straight, we get questions: What does that mean? It’s a great start to conversations. ‘What have you done to get that Leader in Excellence?’ ‘Well, let me tell you what we’ve done.’”



Key Statistics from the 2021 Best of Home Care® Provider of Choice

Reflects award-winning agencies from January - April 2021.

Total Provider of Choice
Award-Winning locations:

813

Number of agencies
that have earned 5 or
more years in a row:

211

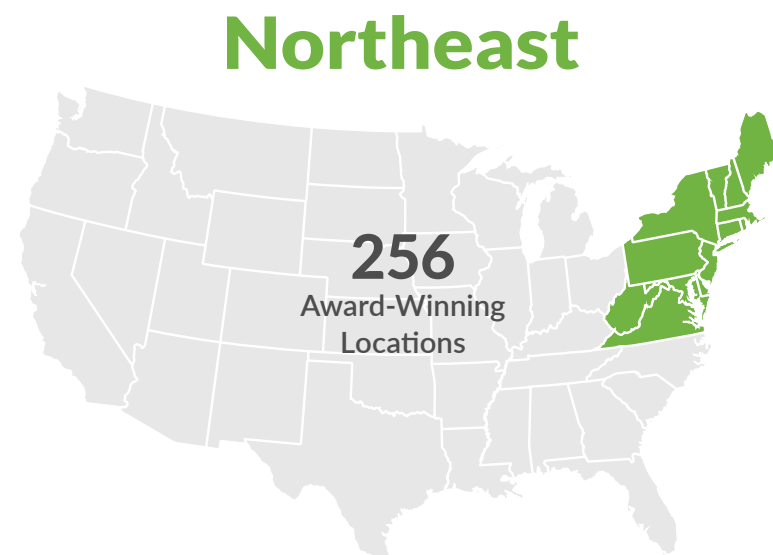
First-time award-winning
locations in 2021:

83

State with the most Provider of Choice
award-winning providers:



Region with the most Provider of Choice
award-winning providers:



Region Ranks

Northeast: **256**
Southern: **162**
Pacific: **154**
Great Lakes: **124**
Central: **117**



PROVIDER OF CHOICE



Best of Home Care® Provider of Choice

The Best of Home Care® Provider of Choice Award is given to home care businesses that excel above the industry standard for quality in home care. They have received the highest satisfaction scores from their current clients, based on monthly client surveys conducted by Home Care Pulse. The Provider of Choice Award shows current and prospective clients that these providers are dedicated to client satisfaction and quality. To learn more, visit www.homecarepulse.com.

Special Note: The following includes all winners as of April 2021. The 2021 Best of Home Care Award is based on 2020 performance. You can also find these providers by zip code by visiting bestofhomecare.com.

UNITED STATES

ALABAMA

- Bluebird Homecare - Birmingham
- BrightStar Care - Birmingham
- BrightStar Care - North Mobile/Baldwin Co.
- BrightStar Care - Springhill/West Mobile
- Home Care Assistance - Huntsville
- Home Helpers - Birmingham
- SYNERGY HomeCare - Daphne

ARIZONA

- ABRIo Care - Yuma
- Adultcare Assistance Homecare - Sun City
- Adultcare Assistance Homecare - Tucson
- Assisting Hands Home Care - Phoenix
- BAYADA Home Health Care, Green Valley Adult
- BAYADA Home Health Care, Tempe
- BAYADA Home Health Care, Tucson East Adult
- BAYADA Home Health Care, Tucson Skilled
- BAYADA Home Health Care, Tucson West Adult

- Blessings! For Seniors
- BrightStar Care - Mesa
- BrightStar Care - Phoenix NE
- BrightStar Care - South Greater Scottsdale
- BrightStar Care - Tucson/Sierra Vista
- Catalina In-Home Services
- Celestial Care
- ComForCare - Phoenix
- Home Assist Health
- Home Assist Health - DDD
- Home Care Assistance Green Valley
- Right at Home - Tucson
- SYNERGY HomeCare - Sun City
- SYNERGY HomeCare - Tucson
- Total Care Connections
- Vida At Home
- Visiting Angels - East Valley
- Visiting Angels of Northern Arizona
- Visiting Angels South Phoenix / Casa Grande

ARKANSAS

- BrightStar Care - Fayetteville
- BrightStar Care - Little Rock
- Elder Independence Home Care

- Right at Home - Hot Springs Village
- Right at Home - Metro Little Rock
- SYNERGY HomeCare - Little Rock

CALIFORNIA

- A Peace of Mind Home Care Solutions
- A Quality IN Home Care
- Acti-Kare Responsive In-Home Care
- ApexCare
- Arosa - Inland Empire
- Arosa - Orange County
- Arosa - San Diego
- Arosa - Silicon Valley
- Assistance in Home Care
- BrightStar Care - Beverly Hills
- BrightStar Care - Carlsbad
- BrightStar Care - Chico
- BrightStar Care - Concord
- BrightStar Care - Conejo Valley
- BrightStar Care - Costa Mesa
- BrightStar Care - Costa Mesa
- BrightStar Care - Escondido/San Marcos
- BrightStar Care - Huntington Beach
- BrightStar Care - Lafayette



PROVIDER OF CHOICE

- BrightStar Care - Lake Forest
- BrightStar Care - Newport Beach / Irvine
- BrightStar Care - Oakland
- BrightStar Care - Roseville
- BrightStar Care - Roseville
- BrightStar Care - S. San Fernando Valley
- BrightStar Care - San Clemente
- BrightStar Care - San Luis Obispo
- BrightStar Care - Santa Monica / Marina Del Rey
- BrightStar Care - Torrance / Manhattan Beach
- Care from the Heart
- Carefree Home Care
- CareWorks Health Services
- Comfort Keepers 521 - Coronado
- Continuity Care Staffing Services Inc.
- Everlight Care
- Family inHome Caregiving
- Family Matters In-Home Care
- Firstat Nursing Services
- Help and Care
- Hillendale Home Care
- Home Care Assistance - Sacramento

- Home Care Providers & Home Care Nurses
- Home Helpers - Berkeley
- Home Helpers - North San Diego
- Home Helpers - Redding
- Home Helpers - San Mateo
- Home Helpers of Santa Clara Valley
- Home Helpers of Santa Rosa
- HomeLife Senior Care
- Homewatch CareGivers - West Los Angeles & South Bay
- JFS Care
- Lifespan
- Mom's Home Care
- Nu Care Inc.
- Partners In Home Care
- Right at Home - Burbank
- Right at Home - Cypress
- Right at Home - Fresno
- Right at Home - Palm Desert
- Right at Home - Santa Monica
- Right at Home - Tustin
- SYNERGY HomeCare - Corona
- SYNERGY HomeCare - La Mesa

- SYNERGY HomeCare - Long Beach
- SYNERGY HomeCare - San Diego
- SYNERGY HomeCare - San Mateo
- SYNERGY HomeCare - South Placer County
- SYNERGY HomeCare of Fresno
- Tender Rose
- Touched by Angels Home Care
- Tristar Home Care
- Visiting Angels - Alameda
- Visiting Angels - Cameron Park
- Visiting Angels - Eureka
- Visiting Angels - Fresno
- Visiting Angels - J&M Homecare Services, LLC
- Visiting Angels - J&M Homecare Services, LLC
- Visiting Angels - Livermore
- Visiting Angels Midtown Sacramento
- Visiting Angels of Santa Barbara

COLORADO

- Abby Senior Care
- Always Best Care Senior Services - Boulder County and North Metro Denver

- BAYADA Home Health Care, Denver
- BrightStar Care - Colorado Springs
- Comfort Keepers - 964 North
- Extended Family Home Care
- Family Tree In-Home Care - Denver
- Home Care Assistance of Centennial
- Home Helpers - Colorado Springs
- Home Helpers - Thornton
- HomeCare of the Rockies
- Homewatch CareGivers - Englewood
- Homewatch CareGivers - Windsor
- SYNERGY HomeCare - Broomfield
- SYNERGY HomeCare - Colorado Springs
- SYNERGY HomeCare - Longmont
- SYNERGY HomeCare - West Denver
- Visiting Angels - Grand Junction
- Visiting Angels - Pagosa Springs
- Visiting Angels - Pueblo

- Western Slope In-Home Care

CONNECTICUT

- Always Best Care - Milford
- Assured Quality Home Care, LLC [ASQ]
- BrightStar Care - Bridgeport
- BrightStar Care - Stamford
- Care at Home
- ComForCare - Stamford
- Comfort Keepers - Enfield
- Euro-American Homecare - Berlin
- Franciscan Ever There Care
- Home Helpers - Enfield
- LIFETIME Care at Home - Guilford
- Sheraton Caregivers - Westport
- SYNERGY HomeCare - Fairfield
- Visiting Angels - Fairfield

DELAWARE

- BAYADA Home Health Care, Central Delaware
- BAYADA Home Health Care, Central Delaware Nursing
- BAYADA Home Health Care, Delaware Adult Nursing



PROVIDER OF CHOICE

- BAYADA Home Health Care, Delaware Assistive Care
- Families 1st Choice Home Care
- Griswold Home Care - Wilmington
- Home Instead Senior Care 179-Dover
- Home Instead Senior Care Sussex

DISTRICT OF COLUMBIA

- Philia
- Right at Home - Washington, DC

FLORIDA

- Assisting Hands Home Care - Naples
- BAYADA Home Health Care, Orlando
- BAYADA Home Health Care, Pinellas County
- BAYADA Home Health Care, Pinellas County Skilled
- BAYADA Home Health Care, Tampa Assistive Care
- BAYADA Home Health Care, Tampa)

- BrightStar Care - Bay County
- BrightStar Care - Delray Beach
- BrightStar Care - East Pasco County
- BrightStar Care - Ft. Myers
- BrightStar Care - Kissimmee/Osceola
- BrightStar Care - Miami Beach
- BrightStar Care - North Central Broward Co.
- BrightStar Care - North Miami
- BrightStar Care - Pensacola
- BrightStar Care - Sun City
- BrightStar Care - SW Orlando
- BrightStar Care - Tampa
- BrightStar Care - Venice
- BrightStar Care - West Seminole County
- BrightStar Care of Jupiter/Martin County
- Collier Home Care
- Comfort Keepers - Hollywood
- Concierge Care of Daytona
- Concierge Care of Jacksonville
- Concierge Care of Ocala

- Concierge Care of Ponte Vedra
- Home Care Assistance - Naples
- Home Care Assistance of Ft. Lauderdale
- Home Care Assistance of Palm Beach County
- Home Helpers - Brandon
- Home Helpers - Clearwater
- Homewatch CareGivers Sarasota
- Jewish Family Home Care
- Life Home Health
- Masada Home Care, Inc.
- Plan Life Care, LLC
- Right at Home - Englewood
- SYNERGY HomeCare - Jacksonville
- SYNERGY HomeCare - Miami
- SYNERGY HomeCare - Plantation
- SYNERGY HomeCare - Venice
- Visiting Angels - Jacksonville
- Visiting Angels - Miami
- Visiting Angels - Orlando/Winter Park
- Visiting Angels - Sarasota

- Visiting Angels of Orlando/Ocoee
- Visiting Angels of the Palm Beaches
- Visiting Angels of The Villages
- Visiting Nurse Association Private Care

GEORGIA

- A Helping Hand Home Care
- Angels at Home
- Atlanta Home Care Partners
- BrightStar Care - Cumming/Gainesville
- BrightStar Care - Savannah
- BrightStar Care - St. Simons Island
- BrightStar Care of Cherokee County
- Caring Companions Inc.
- Comforting Arms - Kennesaw
- Georgia Living At Home; East Georgia Region
- Georgia Living At Home; South Atlanta Metro Region
- Georgia Living At Home; South Central Georgia Region

- Georgia Living At Home; South Georgia Region
- Georgia Living At Home; West Georgia Region
- Home Care Matters
- Home Helpers - Atlanta
- Home Helpers - Gainesville
- Kadan Homecare - Atlanta
- SYNERGY HomeCare - Metro Atlanta
- SYNERGY HomeCare - Villa Rica
- SYNERGY HomeCare of NW Atlanta
- Visiting Angels - Brunswick
- Visiting Angels - Hoschton
- Visiting Angels of Alpharetta
- Visiting Angels of Central Georgia

HAWAII

- BAYADA Home Care, Kauai
- BAYADA Home Care, Maui
- BAYADA Home Care, Oahu
- CareResource Hawaii - Hilo
- CareResource Hawaii - Oahu

IDAHO

- BrightStar Care - Boise
- Family Resource Home Care - Boise



PROVIDER OF CHOICE

- Home Helpers - Coeur D'Alene
- Home Helpers - Nampa
- Kire's Test Agency (Registry Model)
- Visiting Angels of Eastern Idaho

ILLINOIS

- Always Best Care - Glenview
- Arosa - Grayslake RM Only
- Arosa - Skokie RM Only
- BrightStar Care - Elmwood Park
- BrightStar Care - Gurnee
- BrightStar Care - Oak Brook
- BrightStar Care - Tinley Park
- For Papa's Sake Home Care - Arlington Heights
- Home Helpers - Bloomington
- Home Helpers - Bourbonnais
- Home Helpers - DuPage Suburbs
- Inspired Home Care & Big Hearts Home Care
- Norwood Seniors Network
- Right at Home - Grayslake,
- Right at Home - Orland Park

- Right at Home - West Dundee
- Seniors Helping Seniors - Chicago Metro North
- SYNERGY HomeCare - Barrington
- SYNERGY HomeCare - Chicago
- SYNERGY HomeCare - Gurnee
- SYNERGY HomeCare - Oak Park
- SYNERGY HomeCare of Central Illinois
- Visiting Angels - Crystal Lake
- Visiting Angels - Peoria
- Visiting Angels - Plainfield
- Visiting Angels - Rockford
- Visiting Angels of Springfield

INDIANA

- BrightStar Care - E. Fort Wayne (K)
- BrightStar Care - East Lake County
- Home Helpers - Northwest Indiana
- Home Helpers - Scottsburg
- Home Helpers - Warsaw
- Seasons HomeCare
- SYNERGY HomeCare of Richmond

- Visiting Angels - East Central
- Visiting Angels - Fort Wayne
- Visiting Angels - Frankfort & Lafayette
- Visiting Angels - Nappanee
- Visiting Angels of Northwest Indiana

IOWA

- BrightStar Care - Des Moines
- Home Care Assistance - Des Moines

KANSAS

- Always There Senior Care, Inc.
- Craig Home Care - Topeka
- Grace Home Care
- SYNERGY HomeCare - Overland Park

KENTUCKY

- Heaven Sent Care
- Helping Hands NKY
- Home Helpers - London
- Home Helpers of Lexington

LOUISIANA

- ComForCare Home Care - Slidell
- Juvo Home Care

- New Day Personal Care Services
- Right at Home - Lafayette

MAINE

- Visiting Angels - Bangor

MARYLAND

- Absolute Companion Care
- Advanced Nursing and Home Support
- Avila Home Care
- BAYADA Home Health Care, Baltimore
- BrightStar Care - Bel Air
- BrightStar Care - Rockville
- Capital City Nurses
- Griswold Home Care - Harford-Cecil
- Home With You Senior Care
- Regent Healthcare, Inc.
- Shepherd's Staff In-home Care
- SYNERGY HomeCare - Maryland
- SYNERGY HomeCare of Rockville
- Visiting Angels - Pikesville

MASSACHUSETTS

- Arosa - Boston
- BAYADA Home Health Care, Beverly

- BAYADA Home Health Care, Braintree
- BAYADA Home Health Care, Hyannis
- BAYADA Home Health Care, Marlborough
- BAYADA Home Health Care, Newton
- BAYADA Home Health Care, Plymouth
- BrightStar Care - Woburn
- Comfort Keepers - South Shore and Cape Cod
- Golden Years Home Care Services
- Home Helpers - Canton
- Home Helpers - Wayland
- HouseWorks - T1
- Mindful HealthCare Agency
- SYNERGY HomeCare- Greater Boston
- Treasure of Hope Inc
- Visiting Angels - Chelmsford
- Visiting Angels - Chelsea
- Visiting Angels - Newburyport, MA / Stratham, NH
- Visiting Angels - North Attleboro



PROVIDER OF CHOICE

- Visiting Angels - West Springfield
- Visiting Angels - Worcester
- Visiting Angels of the Berkshires

MICHIGAN

- Ascension Health Homes
- Asona Home Health
- Bayside Home Care
- BrightStar Care - Howell/Brighton
- BrightStar Care - Novi
- Fresh Perspective Home Care
- Gauthier Family Home Care, LLC - Grand Rapids
- Home Helpers - Otsego
- Home Sweet Home In-Home Care - Battle Creek
- Home Sweet Home In-Home Care - Kalamazoo
- Home Sweet Home In-Home Care - St. Joseph
- Homejoy of Kalamazoo
- Homejoy of Marshall
- Homejoy of Mid Michigan
- Homejoy of Three Rivers
- Homewatch CareGivers - Ann Arbor
- In-Home Companions
- Leaves Personal Care
- Seniors Helping Seniors of Michigan

- SYNERGY HomeCare - Downriver & South Wayne County
- SYNERGY HomeCare - Farmington
- Visiting Angels - Detroit
- Visiting Angels - Great Lakes Bay
- Visiting Angels - Monroe
- Visiting Angels - Plymouth
- Visiting Angels - Port Huron
- Visiting Angels - Sterling Heights
- Visiting Angels of Southwest Michigan

MINNESOTA

- Brightstar Care - Plymouth
- BrightStar Care - Scott/Carver County
- BrightStar Care - South Minneapolis Metro
- BrightStar Care - St. Croix Valley
- Great Oak Senior Care, Inc.
- Homewatch CareGivers - Edina
- Promise Care Inc.
- Right at Home - Bloomington
- SYNERGY HomeCare - Blaine

- SYNERGY HomeCare - Woodbury
- Touching Hearts at Home - Bloomington
- Touching Hearts at Home - Spicer
- Visiting Angels - Maplewood
- Visiting Angels - Rochester
- Visiting Angels - Wayzata
- Visiting Angels Home Care - Mankato

MISSOURI

- Adelmo Family Care
- BrightStar Care - South St. Louis Co.
- Compassionate Nursing Services
- Good Samaritan Senior Care
- Home Helpers of West St. Louis
- Right at Home - St. Charles
- Seniors Home Care

MONTANA

- SYNERGY HomeCare - Billings

NEBRASKA

- Craig Home Care - Omaha
- Helping Hands Stay At Home Care

- Promedcare - Columbus
- Promedcare - Fremont
- Promedcare - Norfolk
- SYNERGY HomeCare - Lincoln
- SYNERGY HomeCare - Omaha

NEVADA

- BrightStar Care - Henderson
- BrightStar Care - SW Las Vegas
- BrightStar Care - W Central Las Vegas
- Visiting Angels of Carson City

NEW HAMPSHIRE

- BrightStar Care - Bedford/Manchester
- Live Free Home Health Care
- Right at Home - Londonderry
- Visiting Angels - Auburn
- Visiting Angels - Nashua
- Visiting Angels of Gilford

NEW JERSEY

- Always Best Care - NW Morris
- Arosa - North Jersey
- Arosa - South Jersey

- Assisting Hands Home Care
- BAYADA Home Health Care Live-In Office
- BAYADA Home Health Care, Burlington
- BAYADA Home Health Care, Burlington County Skilled
- BAYADA Home Health Care, Cherry Hill Assistive Care
- BAYADA Home Health Care, Dover
- BAYADA Home Health Care, Essex
- BAYADA Home Health Care, Hackensack Adult Nursing
- BAYADA Home Health Care, Hackensack
- BAYADA Home Health Care, Hudson County
- BAYADA Home Health Care, Jersey City
- BAYADA Home Health Care, Mercer County Adults
- BAYADA Home Health Care, Mercer County Assistive Care



PROVIDER OF CHOICE

- BAYADA Home Health Care, Middlesex Assistive Care (MAC - 690)
- BAYADA Home Health Care, Millville, NJ (MIL - 52)
- BAYADA Home Health Care, Monmouth County Skilled (MCS - 780)
- BAYADA Home Health Care, Morris County Adult Nursing (MAN - 687)
- BAYADA Home Health Care, Morristown, NJ (MOR - 6)
- BAYADA Home Health Care, North Brunswick, NJ (NB - 25)
- BAYADA Home Health Care, Passaic County, NJ (PAS - 74)
- BAYADA Home Health Care, Perth Amboy, NJ (PER - 128)
- BAYADA Home Health Care, Red Bank (RED - 61)
- BAYADA Home Health Care, Toms River Assistive Care (TRA - 772)
- BAYADA Home Health Care, Union, NJ (UNI - 69)
- BAYADA Home Health Care, Verona Adult

- BAYADA Home Health Care, Westfield
- BrightStar Care - Hackensack
- BrightStar Care - N. Middlesex Co.
- BrightStar Care - NE Morris County
- BrightStar Care - Somerset
- BrightStar Care - Summit
- BrightStar Care - Wayne
- BrightStar Care - Westfield
- ComForCare - Mountainside New Jersey
- Comfort Keepers - Haddonfield
- Comfort Keepers - Pitman
- Executive Care - Toms River
- Expert Home Care
- Family Care Services
- Griswold Home Care - Passaic
- Heartfelt Home Care
- Hibernian Home Care
- Home Helpers - Fort Lee
- Homewatch CareGivers - South Orange
- iCare Home Healthcare Services
- SYNERGY HomeCare - Bordentown

- SYNERGY HomeCare - Central New Jersey
- SYNERGY HomeCare - Metro New Jersey
- SYNERGY HomeCare North West NJ
- SYNERGY HomeCare of N. Central NJ
- SYNERGY HomeCare of South Jersey
- The Senior Company
- United Methodist Communities HomeWorks (Northern)
- Visiting Angels - Atlantic County
- Visiting Angels - Marmora
- Visiting Angels of Matawan

NEW MEXICO

- Nurses With Heart Home Care

NEW YORK

- Alliance HomeCare
- Angels on Call - Carmel
- At Home Independent Living
- BAYADA Home Health Care, Garden City Skilled
- BAYADA Home Health Care, New York Assistive Care

- BAYADA Home Health Care, Suffolk County Skilled
- BAYADA Home Health Care, Westchester Skilled
- BrightStar Care - Central Westchester County
- BrightStar Care - South Brooklyn
- Home Helpers - Huntington
- Home Helpers & Direct Link of CNY
- Home Helpers and Direct Link of Amsterdam
- Regency Health Care
- Right at Home - Miller Place
- Right at Home - Mount Kisco
- Seniors Helping Seniors - Watertown
- STEPS Home Care
- SYNERGY HomeCare - Manhattan -New York
- Touching Hearts at Home - Buffalo
- Touching Hearts at Home of CNY
- Touching Hearts at Home of Rochester
- TruCare
- Westchester Family Care

NORTH CAROLINA

- Amada Senior Care - Eastern North Carolina
- Aware Senior Care, Wake County
- BAYADA Home Health Care, Asheboro (ASB - 151)
- BAYADA Home Health Care, Asheville (ASH - 84)
- BAYADA Home Health Care, Assistive Care of Raleigh (ACR - 714)
- BAYADA Home Health Care, Charlotte (CHA - 196)
- BAYADA Home Health Care, Charlotte Adult North (CAN - 699)
- BAYADA Home Health Care, Charlotte Personal Care (CPC - 712)
- BAYADA Home Health Care, Foothills Adults (FHA - 266)
- BAYADA Home Health Care, Gastonia (GAS - 82)
- BAYADA Home Health Care, Greenville Adults (GRA - 521)
- BAYADA Home Health Care, Hickory Adult Skilled (HAS - 821)
- BAYADA Home Health Care, Salisbury (SAL - 71)



PROVIDER OF CHOICE

- BAYADA Home Health Care, Winston-Salem Adult Nursing (WAN ,Äi 222)
- BAYADA Home Health Care, Winston Salem Assistive Care (WAC - 801)
- BAYADA Home Health Care - Fayetteville State Programs (FSP - 812)
- BAYADA Home Health Care - Wilmington Adults (WLA - 743)
- BrightStar Care - Asheville
- BrightStar Care - Cary
- BrightStar Care - S. Charlotte
- BrightStar Care - SW Mecklenburg Co
- BrightStar Care - Wilmington and Brunswick County
- Four Seasons Home Care, Hendersonville
- Griswold Home Care - Greensboro
- Griswold Home Care - Raleigh
- Home Careolina - Cornelius
- Home Helpers - Cornelius
- Home Helpers - Kernersville
- Homewatch CareGivers - Charlotte

- Nurse Care of North Carolina - Greenville, An Arosa Company
- Right at Home - Belmont
- Right at Home - Wilimington
- Stress Free Home Care Corp.
- TenderHearted Home Care
- Visiting Angels - Charlotte
- Visiting Angels - Gastonia
- Visiting Angels of Northeastern NC, Inc.

OHIO

- ACC Adult Home Care
- BrightStar Care - Hudson/Solon
- Cherished Companions Home Care, LLC
- ComForCare - Dayton
- Family Bridges Home Care - Cincinnati
- Home Care Assistance - Dayton
- Home Helpers - Chillicothe
- Home Helpers - Cincinnati
- Home Helpers - Columbus
- Home Helpers - Dayton
- Home Helpers - Delaware
- Home Helpers - Lancaster
- Home Helpers - Ottawa
- Home Helpers - Utica
- Hummingbird Home Care

- Right at Home - Middleburg Heights
- Right at Home - Westlake
- SYNERGY HomeCare - South Dayton
- Touching Hearts at Home - Dayton
- Visiting Angels - Canton
- Visiting Angels - Cincinnati
- Visiting Angels - Cleveland
- Visiting Angels - Dayton
- Visiting Angels - Mentor
- Visiting Angels - NW Ohio
- Visiting Angels - Salem
- Visiting Angels - West Chester
- Visiting Angels - Westerville
- Visiting Angels of Central Ohio

OKLAHOMA

- Hearts at Home Companion Care
- Home Care Assistance - Edmond
- Laura Lynn's Home Care
- My Choice In Home Senior Services
- Providence Home Care
- Visiting Angels - Oklahoma City
- Visiting Angels - SE Oklahoma City

- Visiting Angels of Tulsa

OREGON

- BrightStar Care - Lane County
- Caring Heart Health & Home Services, Inc.
- Home Matters Caregiving - Courtyard
- New Horizons In-Home Care Solutions - Florence
- United Homecare Services - Beaverton
- United Homecare Services - Coos Bay
- Visiting Angels - Gresham

PENNSYLVANIA

- A Long Term Companion
- Always Best Care - Exton
- Asbury Home Services- Erie
- BAYADA Home Health Care, Downingtown Adult Nursing
- BAYADA Home Health Care, Erie Adults
- BAYADA Home Health Care, Indiana County Adults
- BAYADA Home Health Care, Jamison Adult Nursing

- BAYADA Home Health Care, Lehigh Valley Adult
- BAYADA Home Health Care, Lehigh Valley Skilled
- BAYADA Home Health Care, Lititz Adult Nursing
- BAYADA Home Health Care, Lower Bucks Adult
- BAYADA Home Health Care, Lower Bucks Skilled
- BAYADA Home Health Care, Lycoming State Programs
- BAYADA Home Health Care, Main Line Adult
- BAYADA Home Health Care, Newtown Square Skilled
- BAYADA Home Health Care, Philadelphia
- BAYADA Home Health Care, Philadelphia Skilled
- BAYADA Home Health Care, Pittsburgh Adult Nursing
- BAYADA Home Health Care, Pittsburgh
- BAYADA Home Health Care, Reading Adult
- BAYADA Home Health Care, Wilkes-Barre State Programs



PROVIDER OF CHOICE

- BAYADA Home Health Care, Wilkes-Barre/Scranton
- BAYADA Home Health Care, Williamsport Adult
- BAYADA Home Health Care, Willow Grove
- BrightStar Care - North Bucks County
- BrightStar Care - North Hills/Pittsburgh
- BrightStar Care - Stroudsburg
- Christian Standards for Christian Care
- ComForCare Home Care - Southeast Montgomery County
- Effraim Home Care Agency
- Ella Home Care
- Family Caregivers Network
- Griswold Home Care - Northampton
- Griswold Home Care - Wilkes Barre
- Harmony Home Healthcare
- Home Care Assistance - Greater Philadelphia
- Home Helpers - Drexel Hill
- Home Helpers - Glenmoore
- Home Helpers - Landisville
- Home Helpers - Philadelphia & Cherry Hill

- Home Helpers - Pittsburgh
- Home Helpers - Red Lion
- Home Helpers - Sunbury
- Home Helpers - Walnutport
- Home Nursing Agency Private Duty Home Care
- Homemaker-Home Health Aide Service of Beaver County, Inc.
- JEVS Care at Home (SEM South)
- Liken Home Care
- Loving Arms Elder Care - Warminster
- Messiah Lifeways At Home
- Neighborly Home Care
- Right at Home - Whitehall
- Seniors Helping Seniors - Bucks County
- Seniors Helping Seniors of Southeast PA
- SYNERGY HomeCare - Carlisle
- SYNERGY HomeCare - Exton
- TruCare Home Care
- Visiting Angels - Carlisle
- Visiting Angels - Havertown
- Visiting Angels - Jenkintown & Horsham
- Visiting Angels - Lancaster

- Visiting Angels - Lewisburg
- Visiting Angels - Pittsburgh
- Visiting Angels - Verona
- Visiting Angels - York & Hanover
- VNA of Venango County

RHODE ISLAND

- BAYADA Home Health Care, Rhode Island Assistive Care
- BAYADA Home Health Care, Rhode Island State Programs

SOUTH CAROLINA

- All Hearts Homecare, LLC
- BAYADA Home Health Care, Columbia Adults
- BAYADA Home Health Care, Columbia Assistive Care State Programs (CLS) - 611
- BAYADA Home Health Care, Rock Hill
- BAYADA Home Health Care, Rock Hill State Programs
- BAYADA Home Health Care, Upstate South Carolina
- Beyond Care, LLC
- BrightStar Care - Greenville

- BrightStar Care - Spartanburg
- Carolina Health Care
- Heart of Carolinas Home Care - Mauldin
- Home Helpers - Greer
- RetireEASE Senior Services
- Right at Home - Rock Hill
- Solutions for Living at Home
- SYNERGY HomeCare - Greenville
- SYNERGY HomeCare of the Lowcountry
- Visiting Angels - Duncan

SOUTH DAKOTA

- Kore Cares
- SYNERGY HomeCare - Sioux Falls

TENNESSEE

- BrightStar Care - Chattanooga
- BrightStar Care - Knoxville
- Care Around the Block
- Comfort Keepers - Jackson
- Grace Givers Home Care
- Home Helpers - Cleveland
- Home Helpers - Kingsport
- Home Helpers - Signal Mountain
- Home Helpers of Middle Tennessee

- Preferred Care at Home of North Nashville, Sumner and East Wilson
- Touching Hearts at Home of Middle Tennessee
- Visiting Angels - Knoxville

TEXAS

- Agape Home Care
- Always Best Care - Fort Worth
- Always Best Care - Woodlands North Houston
- Amada Senior Care of Dallas
- Assisting Hands of Humble
- Assisting Hands of Preston Hollow
- At Your Side Home Care - The Woodlands
- BrightStar Care - Bunker Hill / W Metro Houston
- BrightStar Care - Denton
- BrightStar Care - Flower Mound
- BrightStar Care - Friendswood
- BrightStar Care - Grapevine
- BrightStar Care - Laredo
- BrightStar Care - North Central San Antonio (K)
- BrightStar Care - North Houston/The Woodlands



PROVIDER OF CHOICE

- BrightStar Care - Plano
- BrightStar Care - Rio Grande Valley
- BrightStar Care - SW Fort Worth - Burleson
- BrightStar Care - West Austin/Lake Travis
- BrightStar Care - West Houston/Katy
- Divine Home Care Services
- Encore Caregivers - Houston
- Griswold Home Care - Houston
- Griswold Home Care - SE Houston
- Hearts at Home Senior Care - Houston
- Hearts at Home Senior Care - San Antonio
- Heavenly Care Home Health
- Home Care Assistance - Fort Worth
- Home Care Assistance - Rockwall
- Home Care Assistance of North Houston
- Home Helpers - Carrollton
- Home Helpers & Direct Link of Rockwall
- Home Helpers Home Care

- Home Helpers of North Central Texas
- Homewatch CareGivers - El Paso
- Homewatch CareGivers of Houston Galleria
- Montebello Home Care - Beaumont
- PALS Home Health
- Ray of Sunshine Senior Care
- Right at Home - Dallas
- Right at Home - Euless
- Right at Home - Galveston
- Right at Home - Midlothian
- Right at Home - NW Houston
- Right at Home - Round Rock
- Right at Home - Tyler
- Senior Helpers - Victoria
- SureCare At Home
- SYNERGY HomeCare - Allen
- SYNERGY HomeCare - Houston
- SYNERGY HomeCare - Lubbock
- SYNERGY HomeCare - Plano
- SYNERGY HomeCare of Greater San Antonio
- Visiting Angels - Magnolia

- Visiting Angels - Northwest Houston
- Visiting Angels - San Antonio
- Visiting Angels - Southeast Central Texas
- Visiting Angels - Tyler
- Visiting Angels of HEB

UTAH

- Aspen Senior Care
- BrightStar Care - Mountainside
- Danville Support Services
- Right at Home - Salt Lake City
- Visiting Angels - West Jordan
- Visiting Angels of Davis/Weber
- Visiting Angels of Salt Lake City

VERMONT

- BAYADA Home Health Care, Brattleboro
- Home Care Assistance of Greater Burlington
- SYNERGY HomeCare of Champlain Valley
- VNA & Hospice of the Southwest Region, Inc.

VIRGINIA

- BAYADA Home Health Care, Williamsburg
- BrightStar Care - Fredericksburg & Springfield
- BrightStar Care - Gainesville
- Care Advantage - Charlottesville
- Care Advantage - Colonial Heights
- Care Advantage - Mechanicsville
- Care Advantage - Richmond
- Care Advantage - Roanoke
- Care Advantage - Staunton
- Griswold Home Care NoVA West
- Homewatch Caregivers of Loudoun
- Independent You Senior Services
- Ingleside at Home - Virginia
- Moon River Senior Care and Transportation
- Old Dominion Home Care
- Paragon Home Care
- Ready Hands
- Seniorcorp - Virginia Beach
- SYNERGY HomeCare - Arlington/Alexandria

- SYNERGY HomeCare - Central Virginia
- Unlimited Care 4 Corporation
- Vinson Hall RCA
- Visiting Angels - Charlottesville
- Visiting Angels - Fredericksburg
- Visiting Angels - Kilmarnock
- Visiting Angels - Lynchburg
- Visiting Angels - Manassas
- Visiting Angels - Midlothian
- Visiting Angels - Newport News
- Visiting Angels - Roanoke

WASHINGTON

- Acti-Kare Responsive In Home Care
- Advanced Health Care, Inc.
- Always Best Care Senior Services of Tacoma/Gig Harbor
- Angel Senior Care
- Family First Senior Care
- Family Resource Home Care - Inland Northwest
- Family Resource Home Care - Seattle
- Family Resource Home Care - Tri-Cities
- Home Care Solutions



PROVIDER OF CHOICE

- Homewatch CareGivers of Tacoma
- HomeWell Care Services - Federal Way
- HopeBridge Home Health
- Martha & Mary AT HOME
- Right at Home - Bellingham
- Right at Home - Seattle
- SYNERGY HomeCare - Vancouver
- Visiting Angels - Bellingham
- Visiting Angels - Mt Vernon
- Visiting Angels - Tacoma
- Visiting Angels Snoqualmie Valley/Maple Valley
- Home Helpers - Oconomowoc
- Home Helpers of Greater Milwaukee
- Home Helpers of Southeast Wisconsin
- Rent-A-Daughter
- Right at Home - Germantown
- Right at Home - West Allis

CANADA

BRITISH COLUMBIA

- Serenity Home Care Ltd.

WEST VIRGINIA

- BrightStar Care - The Mid-Ohio Valley
- Home Helpers - Martinsburg
- Visiting Angels - Charleston
- Visiting Angels - Wheeling

WISCONSIN

- At Your Service Inc.
- BrightStar Care - Baraboo
- BrightStar Care - Central Milwaukee
- BrightStar Care - La Crosse
- BrightStar Care - West Bend
- Home Care Assistance - Oshkosh & Appleton



Key Statistics from the 2021 Best of Home Care® Employer of Choice

Reflects award-winning agencies from January - April 2021.

Total Employer of Choice
Award-Winning locations:

606

Number of agencies
that have earned 5 or
more years in a row:

164

First-time award-winning
locations in 2021 :

59

State with the most Employer of Choice
award-winning providers:

California

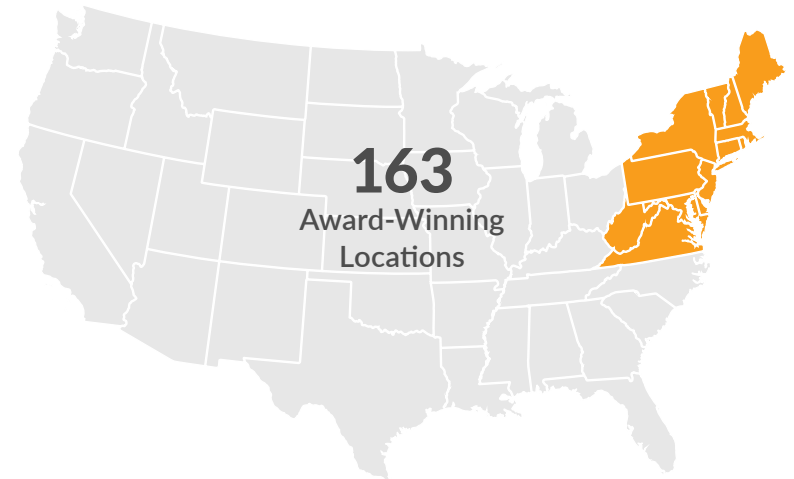
68
Award-Winning
Locations

Top 5 States

California: **68**
Texas: **60**
Florida: **32**
Pennsylvania: **28**
New Jersey/Michigan: **27**

Region with the most Employer of Choice
award-winning providers:

Northeast



163
Award-Winning
Locations

Region Ranks

Northeast: **163**
Central: **140**
Southern: **105**
Pacific: **101**
Great Lakes: **97**

Number of repeat award-winning
locations: *(from last year)*

481



EMPLOYER OF CHOICE

**Best of Home Care®
Employer of Choice**

The Best of Home Care® Employer of Choice Award is given to home care businesses that receive the highest satisfaction scores from their current caregivers. These businesses support and train their caregivers, and their caregiver satisfaction scores have earned them recognition as a top employer. This recognition gives current and prospective clients peace of mind, knowing these providers and their caregivers are dedicated to providing the best in-home care possible. To learn more, visit www.homecarepulse.com.

Special Note: The following includes all winners as of April 2021. The 2021 Best of Home Care Award is based on 2020 performance.

UNITED STATES

ALABAMA

- Bluebird Homecare - Birmingham
- BrightStar Care - North Mobile/Baldwin Co.
- Home Care Assistance - Huntsville

ARIZONA

- ABRIo Care - Yuma
- Adultcare Assistance Homecare - Sun City
- Assisting Hands Home Care - Phoenix
- Ballard Senior Home Care
- BrightStar Care - South Greater Scottsdale
- BrightStar Care - Tucson/ Sierra Vista
- Catalina In-Home Services
- Celestial Care
- ComForCare - Phoenix
- Devoted Guardians
- Doves at Home Senior Care
- Home Assist Health
- Home Care Assistance - Green Valley
- Home Care Assistance - Tucson
- Right at Home - Tucson
- SYNERGY HomeCare - Tucson

- SYNERGY HomeCare of Prescott
- Vida At Home
- Visiting Angels - East Valley
- Visiting Angels - Glendale
- Visiting Angels of Northern Arizona
- Visiting Angels South Phoenix / Casa Grande

ARKANSAS

- BrightStar Care - Hot Springs/Benton
- BrightStar Care - Little Rock
- Elder Independence Home Care
- Right at Home - Hot Springs Village
- Right at Home - Metro Little Rock
- SYNERGY HomeCare - Little Rock

CALIFORNIA

- A Peace of Mind Home Care Solutions
- A Quality IN Home Care
- Acti-Kare Responsive In-Home Care
- Arosa - East Bay
- Arosa - San Diego
- Arosa - Silicon Valley

- Assistance in Home Care
- BrightStar Care - Beverly Hills
- BrightStar Care - Carlsbad
- BrightStar Care - Central Western Riverside Co.
- BrightStar Care - Central Western Riverside Co. (HHA)
- BrightStar Care - Conejo Valley
- BrightStar Care - Dublin
- BrightStar Care - Huntington Beach
- BrightStar Care - Lafayette
- BrightStar Care - Lake Forest
- BrightStar Care - Roseville
- BrightStar Care - Roseville
- BrightStar Care - San Luis Obispo
- BrightStar Care - Santa Barbara
- BrightStar Care - Santa Monica / Marina Del Rey
- Carefree Home Care
- CareWorks Health Services
- Complete Care at Home
- Continuity Care Staffing Services Inc.
- Craig Cares
- Everlight Care
- Families Choice Home Care
- Family inHome Caregiving
- Family Matters In-Home Care



EMPLOYER OF CHOICE

- Firstat Nursing Services
- Help and Care
- Hillendale Home Care
- Hired Hands Homecare
- Home Care Assistance of Palm Desert
- Home Helpers - North San Diego
- Home Helpers - Redding
- Home Helpers - San Mateo
- HomeLife Senior Care
- Homewatch CareGivers - West Los Angeles & South Bay
- JFS Care
- Lifespan
- Mom's Home Care
- New Start Home Health
- Partners In Home Care
- Peggy's Home Care
- Right at Home - Aptos
- Right at Home - Burbank
- Right at Home - Cypress
- Right at Home - Fresno
- Right at Home - Palm Desert
- Right at Home - Sacramento
- Right at Home - San Diego
- Right at Home - Santa Monica
- Right at Home - Tustin
- Tender Rose

- Touched by Angels Home Care
- Visiting Angels - Alameda
- Visiting Angels - Cameron Park
- Visiting Angels - Eureka
- Visiting Angels - Fresno
- Visiting Angels - Livermore
- Visiting Angels - Long Beach
- Visiting Angels - Scotts Valley and Marina
- Visiting Angels - South Bay
- Visiting Angels - Sunnyvale
- Visiting Angels Midtown Sacramento
- Visiting Angels of Santa Barbara

COLORADO

- ComForCare Home Care - Denver South
- Comfort Keepers - 964 North
- Extended Family Home Care
- Home Care Assistance of Centennial
- Home Care Assistance of Jefferson County
- HomeCare of the Rockies
- Homewatch CareGivers - Englewood

- Homewatch CareGivers - Windsor
- HomeWell Care Services of Northern Colorado
- SYNERGY HomeCare - Broomfield
- SYNERGY HomeCare - Longmont
- Talem Home Care - Broomfield
- Touching Hearts at Home - Aurora
- Visiting Angels - Colorado Springs
- Visiting Angels - Grand Junction
- Visiting Angels - Pagosa Springs
- Visiting Angels - Pueblo
- Western Slope In Home Care

CONNECTICUT

- Always Best Care - Milford
- Always Best Care - Wallingford
- Assisted Living Services, Inc.
- Assured Quality Home Care, LLC [ASQ]
- BrightStar Care - Stamford
- Care at Home
- ComForCare - Stamford

- Euro-American Homecare - Berlin
- Franciscan Ever There Care
- Independence at Home for Hartford
- LIFETIME Care at Home - Guilford
- Right at Home - Monroe
- Right at Home - Wallingford
- RVNAhealth StayWELL
- Sheraton Caregivers - Westport
- SYNERGY HomeCare - Danbury
- SYNERGY HomeCare - East Haven
- SYNERGY HomeCare - Fairfield
- Visiting Angels - Fairfield

DELAWARE

- CarpeVITA Home Care
- Families 1st Choice Home Care

DISTRICT OF COLUMBIA

- Philia
- Right at Home - Washington, DC

FLORIDA

- Assisting Hands Home Care - Naples
- BrightStar Care - Bay County
- BrightStar Care - Delray Beach
- BrightStar Care - Kissimmee/Osceola
- BrightStar Care - Melbourne
- BrightStar Care - Naples
- BrightStar Care - North Central Broward Co.
- BrightStar Care - North Miami
- BrightStar Care - Pembroke Pines
- BrightStar Care - SW Orlando
- BrightStar Care - Tampa
- BrightStar Care of Jupiter/ Martin County
- Collier Home Care
- Comfort Keepers - Altamonte Springs and Volusia County
- Comfort Keepers - Hollywood
- Concierge Care of Daytona
- Concierge Care of Fort Myers



EMPLOYER OF CHOICE

- Concierge Care of Jacksonville
- Concierge Care of Ocala
- Concierge Care of Palm Coast
- Concierge Care of Ponte Vedra
- Concierge Care of Tampa
- Home Care Assistance - Naples
- Home Care Assistance of Ft. Lauderdale
- Home Care Assistance of Palm Beach County
- Homewatch CareGivers Sarasota
- Life Home Health
- Masada Home Care, Inc.
- Plan Life Care, LLC
- RIGHT ACCORD Private Duty-Home Health Care
- Right at Home - Englewood
- SYNERGY HomeCare - Miami

GEORGIA

- A Helping Hand Home Care
- Angels at Home
- Bluebird Homecare - Atlanta
- BrightStar Care - St. Simons Island
- BrightStar Care of Marietta

- Caravita Home Care - Roswell
- Caring Companions Inc.
- Comforting Arms - Kennesaw
- Georgia Living At Home; South Central
- Georgia Living At Home; Georgia Region
- Georgia Living At Home; South Georgia Region
- Home Care Matters
- Home Helpers - Atlanta
- Kadan Homecare - Atlanta
- Visiting Angels - Brunswick
- Visiting Angels - Fayetteville
- Visiting Angels - Hoschton
- Visiting Angels of Alpharetta

HAWAII

- CareResource Hawaii - Molokai

IDAHO

- Family Resource Home Care - Boise
- Visiting Angels of Eastern Idaho

ILLINOIS

- Always Best Care - Glenview
- Arosa - Grayslake RM Only

- Arosa - Skokie RM Only
- BrightStar Care - Gurnee
- BrightStar Care - McHenry
- BrightStar Care - Naperville
- BrightStar Care - North Suburban
- BrightStar Care - Tinley Park
- For Papa's Sake Home Care - Arlington Heights
- Home Helpers - Bloomington
- Home Helpers - Bourbonnais
- Home Helpers - Hinsdale
- Independence-4-Seniors Home Care
- Morning Glory Home Care
- Norwood Seniors Network
- Open Arms Solutions
- Right at Home - Grayslake
- Right at Home - Orland Park
- Right at Home - West Dundee
- Seniors Helping Seniors - Chicago Metro North
- SYNERGY HomeCare - Chicago
- Visiting Angels - Crystal Lake
- Visiting Angels - Peoria

- Visiting Angels - Plainfield
- Visiting Angels - Rockford
- Visiting Angels - South Elgin

INDIANA

- Always Best Care - Michiana
- Visiting Angels - East Central
- Visiting Angels - Fort Wayne
- Visiting Angels - Frankfort & Lafayette
- Visiting Angels - Greencastle
- Visiting Angels - Nappanee
- Visiting Angels of Northwest Indiana

IOWA

- Home Care Assistance - Des Moines
- Home Care Assistance of the Cedar Valley

KANSAS

- Craig Home Care - Ness City
- Grace Home Care

KENTUCKY

- Helping Hands NKY
- Home Helpers - London

LOUISIANA

- ComForCare Home Care - Slidell
- Juvo Home Care
- Right at Home - Lafayette
- Serenity Care Providers
- Visiting Angels - New Orleans

MAINE

- Visiting Angels - Bangor

MARYLAND

- Absolute Companion Care
- Advanced Nursing and Home Support
- BrightStar Care - Bel Air
- BrightStar Care - Bethesda
- BrightStar Care - Howard County
- Capital City Nurses
- Chesapeake Home Health Care
- Home With You Senior Care
- Homewatch CareGivers - Ellicott City
- Prestige Healthcare Resources, Inc.
- Regent Healthcare, Inc.
- Shepherd's Staff In-home Care
- SYNERGY HomeCare - Maryland



EMPLOYER OF CHOICE

- Visiting Angels - Eastern Shore
- Visiting Angels - Harford

MASSACHUSETTS

- Arosa - Boston
- Assisting Hands - Boston Northwest
- BrightStar Care - Danvers/ North Shore
- BrightStar Care - Milford/ Framingham
- HouseWorks - T1
- SYNERGY HomeCare- Greater Boston
- Treasure of Hope Inc
- Visiting Angels - Cape Cod
- Visiting Angels - Chelmsford
- Visiting Angels - Chelsea
- Visiting Angels - Newburyport, MA/ Stratham, NH
- Visiting Angels - Newton/Canton
- Visiting Angels - North Attleboro
- Visiting Angels - Worcester
- Visiting Angels of the Berkshires

MICHIGAN

- Alliance Home Health Care Services - Allegan

- Ascension Health Homes
- Asona Home Health
- BrightStar Care - Ann Arbor
- BrightStar Care - Birmingham
- BrightStar Care - Novi
- BrightStar Care - Traverse City/Northwest Michigan
- Care Plan Inc
- Gauthier Family Home Care, LLC - Grand Rapids
- Home Sweet Home In-Home Care - Battle Creek
- Home Sweet Home In-Home Care - Kalamazoo
- Home Sweet Home In-Home Care - Paw Paw
- Homejoy of Kalamazoo
- Homejoy of Marshall
- Homejoy of Mid Michigan
- Homejoy of Three Rivers
- Homewatch CareGivers - Ann Arbor
- HomeWell Care Services - Oakland County
- In-Home Companions
- Leaves Personal Care
- Seniors Helping Seniors of Michigan
- Visiting Angels - Detroit
- Visiting Angels - Great Lakes Bay

- Visiting Angels - Plymouth
- Visiting Angels - Rochester Hills
- Visiting Angels - Sterling Heights
- Visiting Angels of Southwest Michigan

MINNESOTA

- Brightstar Care - Plymouth
- BrightStar Care - Scott/ Carver County
- BrightStar Care - St. Croix Valley
- Great Oak Senior Care, Inc.
- Homewatch CareGivers - Edina
- SYNERGY HomeCare - Blaine
- Touching Hearts at Home - Bloomington
- Touching Hearts at Home - Spicer

MISSOURI

- Adelmo Family Care
- BlueBird Homecare - St. Louis
- BrightStar Care - Central St. Louis County
- Compassionate Nursing Services
- Good Samaritan Senior Care

- Right at Home - St. Charles
- Seniors Home Care
- Visiting Angels - Joplin

NEBRASKA

- A Place at Home - Omaha
- Helping Hands Stay At Home Care
- Promedcare - Columbus
- Promedcare - Fremont

NEVADA

- BrightStar Care - Henderson
- BrightStar Care - W Central Las Vegas
- Legacy Home Care

NEW HAMPSHIRE

- BrightStar Care - Bedford/ Manchester
- Live Free Home Health Care
- Right at Home - Londonderry
- Visiting Angels - Auburn
- Visiting Angels - Nashua
- Visiting Angels of Gilford

NEW JERSEY

- Always Best Care - NW Morris
- Assisting Hands Home Care

- BrightStar Care - Freehold
- BrightStar Care - Hackensack
- BrightStar Care - Morris County
- BrightStar Care - Mt. Laurel
- BrightStar Care - Wayne
- Comfort Keepers - Haddonfield
- Comfort Keepers - Redbank
- Executive Care - Toms River
- Executive Home Care - South Ocean County
- Family Care Services
- Griswold Home Care - Passaic
- Heartfelt Home Care
- Hibernian Home Care
- Homewatch CareGivers - Princeton
- Homewatch CareGivers - South Orange
- Homewatch CareGivers - Westmont
- HomeWell Care Services - Hackensack
- SYNERGY HomeCare of South Jersey
- The Senior Company



EMPLOYER OF CHOICE

- United Methodist Communities Homeworks Home Care (Central)
- Visiting Angels - Atlantic County
- Visiting Angels - Hillsborough
- Visiting Angels - Marmora
- Visiting Angels - New Jersey
- Visiting Angels of Matawan

NEW MEXICO

- Nurses With Heart Home Care
- Partners Assisted Living Services (PALS)

NEW YORK

- Alliance Homecare
- BrightStar Care - Central Westchester County
- BrightStar Care - South Brooklyn
- Elder Home Care
- Home Helpers & Direct Link of CNY
- Home Helpers and Direct Link of Amsterdam
- Right at Home - Great Neck
- Right at Home - Hicksville
- Right at Home - Miller Place

- Right at Home - Mount Kisco
- Seniors Helping Seniors - Watertown
- STEPS Home Care
- Touching Hearts at Home - Buffalo
- Touching Hearts at Home of CNY
- Touching Hearts at Home of Rochester
- TruCare
- Westchester Family Care

NORTH CAROLINA

- Amada Senior Care - Eastern North Carolina
- Aware Senior Care, Wake County
- Four Seasons Home Care, Hendersonville
- Griswold Home Care - Greensboro
- Griswold Home Care - Raleigh
- Griswold Home Care - Winston-Salem
- Home Careolina - Cornelius
- HomeChoice Home Care Solutions
- Homewatch Caregivers of the Triangle - Cary
- Homewatch Caregivers of the Triangle - Chapel Hill

- Right at Home - Belmont
- Right at Home - Durham
- Right at Home - Mooresville
- Right at Home - Wilimington
- Stress Free Home Care Corp.
- Visiting Angels - Carrboro
- Visiting Angels - Charlotte
- Visiting Angels - Gastonia
- Visiting Angels of Northeastern NC, Inc.
- Well Care Home Care - Brunswick

NORTH DAKOTA

- Griswold Home Care of Fargo - Moorhead
- Right at Home - Fargo

OHIO

- BrightStar Care - Hudson/Solon
- Cherished Companions Home Care, LLC
- Family Bridges Home Care - Cincinnati
- Home Care Assistance - Dayton
- Home Helpers - Lancaster
- HomeWell Care Services - Columbus
- Hummingbird Home Care

- Right at Home - Canton
- Right at Home - Middleburg Heights
- Right at Home - Westlake
- Sunshine Homecare
- Touching Hearts at Home - Dayton
- Visiting Angels - Cincinnati
- Visiting Angels - Mentor
- Visiting Angels - Salem
- Visiting Angels of Central Ohio

OKLAHOMA

- BrightStar Care - Edmond/Oklahoma City
- Hearts at Home Companion Care
- Home Care Assistance - Edmond
- Laura Lynn's Home Care
- Providence Home Care
- Visiting Angels - Edmond
- Visiting Angels - Oklahoma City
- Visiting Angels of Tulsa

OREGON

- A Place at Home - Portland
- Adeo In Home Care - Newport
- BrightStar Care - Lane County

- Caring Heart Health & Home Services, Inc.
- Home Matters Caregiving
- SYNERGY HomeCare - Portland
- United Homecare Services - Beaverton
- United Homecare Services - Coos Bay
- United Homecare Services - McMinnville
- Visiting Angels - Gresham

PENNSYLVANIA

- A Long Term Companion
- Asbury Home Services
- Asbury Home Services- Erie
- BrightStar Care of South Bucks and Southeast Montgomery Counties
- Christian Standards for Christian Care
- ComForCare Home Care - Southeast Montgomery County
- Comfort Keepers - Limerick
- Comfort Keepers - Williamsport
- Deer Meadows Home Health and Support Services, LLC
- Ella Home Care



EMPLOYER OF CHOICE

- Griswold Home Care - Lehigh Valley
- Griswold Home Care - Lower PA
- Griswold Home Care - Northampton
- Griswold Home Care - Wilkes Barre
- Home Helpers - Pittsburgh
- Home Helpers - Walnutport
- JEVS Care at Home (SW)
- Loving Arms Elder Care - Warminster
- Seniors Helping Seniors - Bucks County
- SYNERGY HomeCare - Carlisle
- Visiting Angels - Carlisle
- Visiting Angels - Havertown
- Visiting Angels - Jenkintown & Horsham
- Visiting Angels - Lancaster
- Visiting Angels - Lewisburg
- Visiting Angels - Pittsburgh
- Visiting Angels - Verona
- Visiting Angels - York & Hanover

SOUTH CAROLINA

- All Hearts Homecare, LLC
- Beyond Care, LLC
- BrightStar Care - Rock Hill

- BrightStar Care - Spartanburg
- Carolina Health Care
- RetireEASE Senior Services
- Right at Home - Rock Hill
- Solutions for Living at Home
- Visiting Angels - Duncan

SOUTH DAKOTA

- Kore Cares

TENNESSEE

- BrightStar Care - Chattanooga
- BrightStar Care - East Memphis
- Care Around the Block
- Caregivers by WholeCare - Nashville
- Choices in Senior Care / Care Around the Block
- Comfort Keepers - Jackson
- Grace Givers Home Care
- Home Helpers - Signal Mountain
- Right at Home - Nashville
- Touching Hearts at Home of Middle Tennessee
- Visiting Angels - Knoxville

TEXAS

- Agape Home Care
- Always Best Care Fort Bend County

- Amada Senior Care of Dallas
- Anthem Home Care
- Assisting Hands of Humble
- Assisting Hands of Preston Hollow
- At Your Side Home Care - The Woodlands
- Avid Home Care Solutions
- Benevolent Hearts Home Care
- Best In-Home Care - Lubbock
- Bluebird Homecare - Fort Worth
- BrightStar Care - Bunker Hill / W Metro Houston
- BrightStar Care - Denton
- BrightStar Care - Flower Mound
- BrightStar Care - Friendswood
- BrightStar Care - Frisco
- BrightStar Care - Laredo
- BrightStar Care - North Houston/The Woodlands
- BrightStar Care - Rio Grande Valley
- BrightStar Care - Sugar Land
- Comfort Keepers - Houston
- Comfort Keepers - Longview

- Comfort Keepers - Tyler
- Encore Caregivers - Houston
- Family Tree In-Home Care - Houston
- Friendly Faces - Houston
- Griswold Home Care - Houston
- Griswold Home Care - SE Houston
- Hearts at Home Senior Care - Houston
- Hearts at Home Senior Care - San Antonio
- Heaven at Home
- Home Care Assistance - Denton County
- Home Care Assistance - Fort Worth
- Home Care Assistance - Rockwall
- Home Care Assistance of North Houston
- Home Care Assistance of San Antonio
- Home Care Book
- Home Health Companions
- Home Helpers of North Central Texas
- Homewatch CareGivers - El Paso
- Homewatch CareGivers of Houston Galleria

- Montebello Home Care - Beaumont
- Right at Home - Dallas
- Right at Home - Euless
- Right at Home - Galveston
- Right at Home - Irving
- Right at Home - Midlothian
- Right at Home - NW Houston
- Right at Home - Round Rock
- SureCare At Home
- SYNERGY HomeCare - Beaumont
- SYNERGY HomeCare - Houston
- SYNERGY HomeCare - Lubbock
- SYNERGY HomeCare of Greater San Antonio
- Visiting Angels - Lewisville and Plano
- Visiting Angels - Magnolia
- Visiting Angels - Northwest Houston
- Visiting Angels - San Antonio
- Visiting Angels - Southeast Central Texas
- Visiting Angels of HEB

UTAH

- BrightStar Care - Mountainside



EMPLOYER OF CHOICE

- BrightStar Care - Sandy/Draper
- Danville Support Services
- Home Care Assistance of Utah
- Right at Home - Salt Lake City
- Seniors Helping Seniors - Morgan
- Visiting Angels - West Jordan
- Visiting Angels of Davis/Weber
- Visiting Angels of Salt Lake City

VIRGINIA

- BrightStar Care - Williamsburg
- Care Advantage - Franklin
- Care Advantage - Fredericksburg
- Comfort Keepers - Franklin
- Comfort Keepers - Manassas
- Companion Extraordinaire Home Care Services
- Griswold Home Care - NoVa East
- Home Helpers - Virginia Beach and Yorktown
- Homewatch Caregivers of Loudoun

- Independent You Senior Services
- Ingleside at Home - Virginia
- Moon River Senior Care and Transportation
- Old Dominion Home Care
- Paragon Home Care
- Right at Home - Fairfax
- Seniorcorp - Virginia Beach
- SYNERGY HomeCare - Arlington/Alexandria
- Thrive at Home
- TLC Home Health, Inc.
- Vinson Hall RCA
- Visiting Angels - Lynchburg
- Visiting Angels - Manassas
- Visiting Angels - Midlothian
- Visiting Angels - Newport News
- Visiting Angels - Richmond
- Visiting Angels - Roanoke

WASHINGTON

- Acti-Kare Responsive In Home Care
- Always Best Care Senior Services of Tacoma/Gig Harbor
- Angel Senior Care
- BrightStar Care -Bellevue/ North Seattle
- Care to Stay Home
- CareForce

- Family Resource Home Care - Bellevue
- Family Resource Home Care - Seattle
- Family Resource Home Care - Tacoma
- Family Resource Home Care - Tri-Cities
- Home Care Solutions
- Home Helpers - Poulsbo
- Homewatch CareGivers of Tacoma
- Right at Home - Bellingham
- Right at Home - Seattle
- SYNERGY HomeCare - Vancouver
- Visiting Angels Snoqualmie Valley/Maple Valley

WEST VIRGINIA

- BrightStar Care - The Mid-Ohio Valley
- Visiting Angels - Charleston
- Visiting Angels - Wheeling

WISCONSIN

- At Your Service Inc.
- BrightStar Care - Baraboo
- BrightStar Care - Central Milwaukee
- BrightStar Care - La Crosse
- BrightStar Care - Madison Staffing

- BrightStar Care - South Central
- Home Care Assistance - Oshkosh & Appleton
- Home Helpers - Oconomowoc
- Home Helpers of Greater Milwaukee
- Rent-A-Daughter
- Right at Home - Appleton
- Right at Home - Germantown
- Visiting Angels - Sheboygan

CANADA

BRITISH COLUMBIA

- Home Care Assistance - Victoria
- Serenity Home Care Ltd.

NOVA SCOTIA

- Senior Homecare by Angels

ONTARIO

- Qualicare - Ottawa



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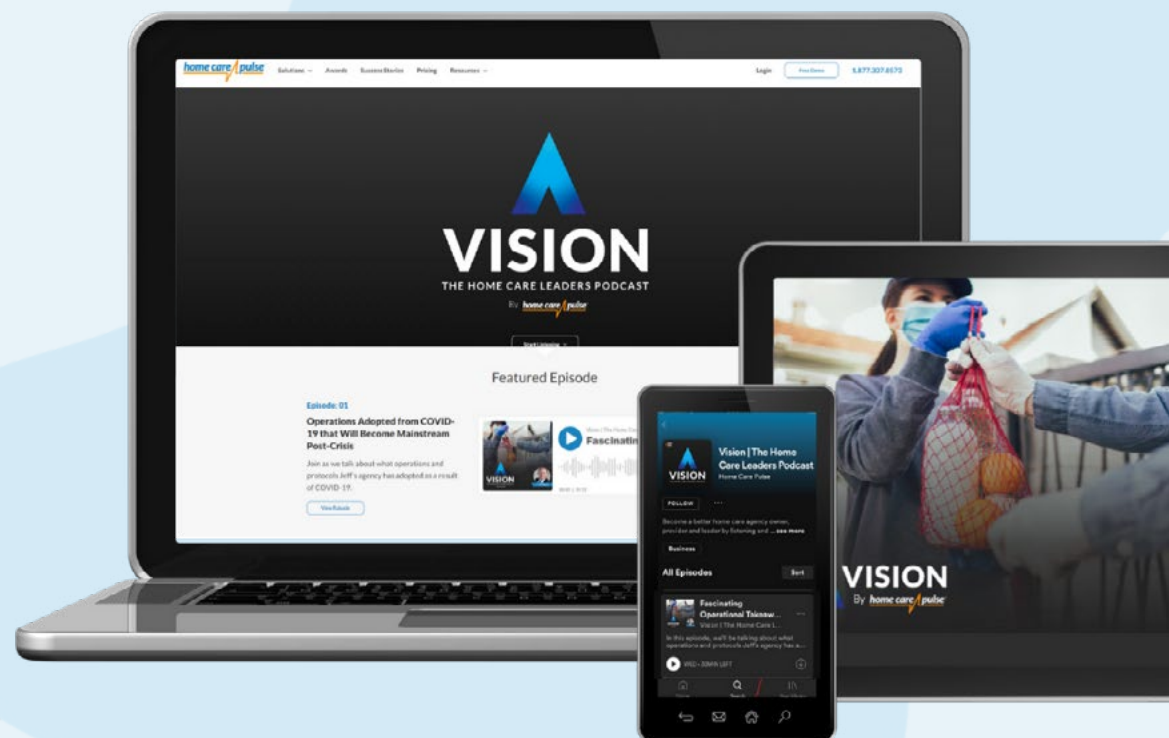
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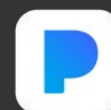
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