

The Pitfalls, Risks, and Rewards of Scaling a Business

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Objectives

- Describe examples of pitfalls a growing agency experiences and how to avoid these mistakes
- Identify and mitigate risks in growing a business
- Discuss tangible rewards by implementing a scalable corporate structure

About Us

- Amy Nelson
 - BS- Health Care Management; MBA
 - Home Care since 2000
 - Founder Accurate Home Care in 2002
- Megan White
 - BSN/PHN University of North Dakota
 - Home Care since 2007
 - Current Director of Nursing, Accurate Home Care

Accurate Home Care

- Founded in 2002
- Pediatric start
- Private Duty Nursing (Extended Hours), Personal Care, Medicare, Mental Health, Homemaking, Respite
- \$65 million revenue (Projected 2015)
- 4,000 employees
- 2,500 clients



A new standard of care. A better quality of life.™

Common Pitfalls

- Organizational Setup
- Recruitment, Staffing, and Retention
- Communication
- Delegation



Organizational Setup

- Legal entities
- License levels
- Agency vs Organization
- Practical implementation
- Leadership
- Lines of Authority
- Organization Chart and communication

Recruitment, Staffing and Retention

- Chicken vs Egg
- Staffing models
 - Choice
 - Block
 - Dictator
- Meet and Greet
- To incentivize or not?

Communication

- Agency level vs Corporation
- All constituents
- Messaging
- Methods

Delegation

- Personality Type
- Levels of authority
- Training
- Micromanaging to ensure follow up
- Trust but verify

Common Risks and Mitigation

- Accepting of patients
- Documentation
- Supervision
- Lack of internal checks and balances
- Clinical Risks
- Liability



Accepting of Patients

- Do you have adequate staff?
- Is staff competent and trained?
- Realistic wait times
- Appropriate assessment for hours
- Family/patient accountability

Documentation

- Standardized requirements
- Education for all staff
- Refrain from subjective documentation
- Coaching as needed
- Not documented = Not done

Supervision

- Minimum standards being met
- LPN vs RN vs HHA/PCA
- Scheduling/verifying cares being done
- Standardized forms
- Yearly evaluations- are they helpful?

Lack of internal checks and balances

- Fraud and abuse
- Missing paperwork
- Chart audits
- Adherence to policies/procedures
- Internal communication

Clinical Risks

- Appropriate staff for clinical complexity
- Routine updated care plans and assessments
- Thorough, detailed orders
- Processes/Protocol for clarifications of treatments
- Empowerment of staff
- Care plan update line

Liability

- Employment cases
- Employment files updated
- Clinical records complete
- Ongoing training and documentation
- General liability
- Worker's compensation claims

Rewards

- Strengths
- Empowerment
- Metrics and incentives
- AHC Rewards program
- Education advancement
- Career ladder



Strengths

- Behavioral profiles
- Feed what motivates staff
- Organizational Development plan
- Dedicated developments plans
- Honesty and addressing behavioral limitations
- Reviews that are helpful

Empowerment

- Culture
- Trust has to be earned
- Confidence
- Level of authority
- Get out the way
- Let them make mistakes

Metrics and Incentives

- Departmental metrics
- Measurable and achievable
- General alignment with the organization goals
- Parameters for achieving
- Unintended consequences

Take-Aways

- Organize to comply with regulations
- Quality leadership – take the time to train
- Find different ways to communicate – often
- Be creative and thoughtful about staffing
- Give authority to make mistakes
- Dashboards and checks and balances
- Rewards that speak to strengths