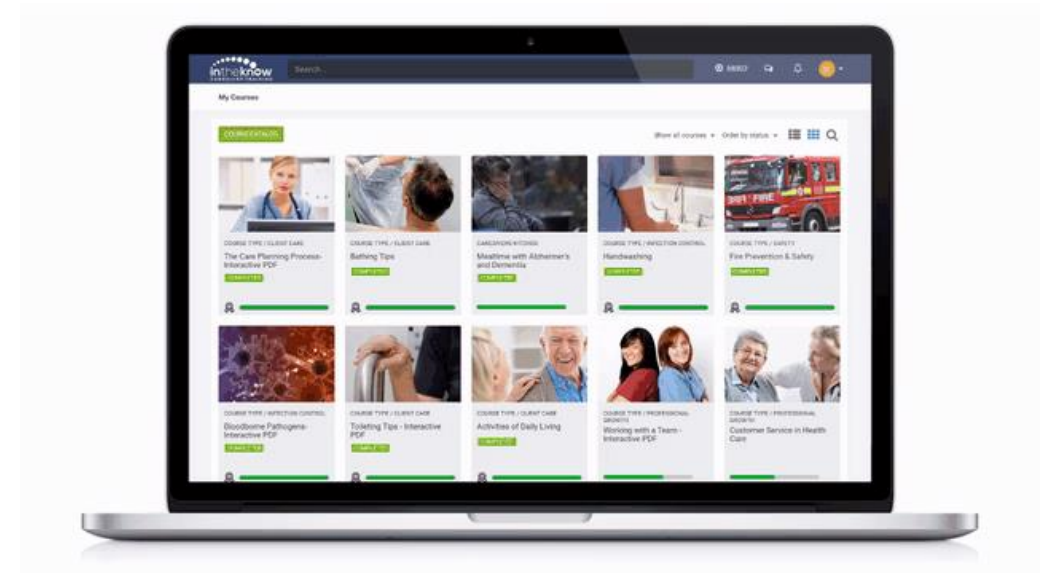
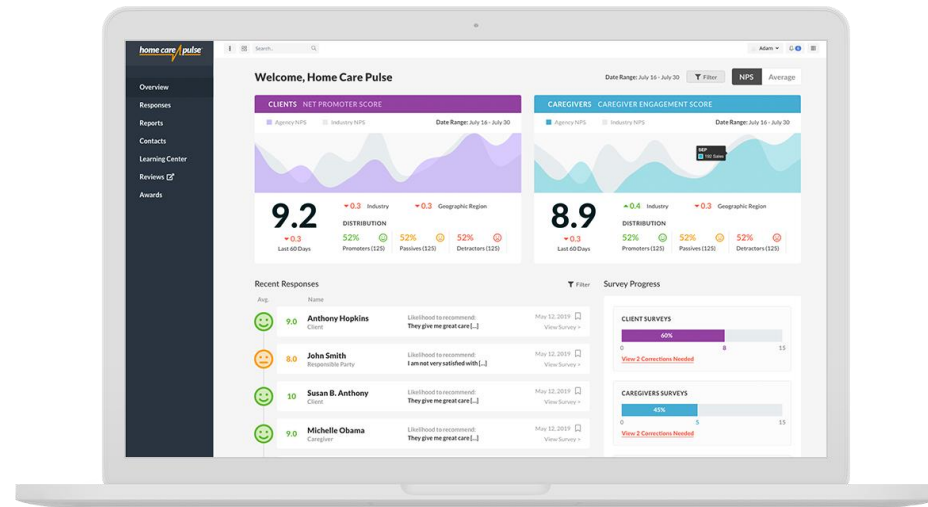
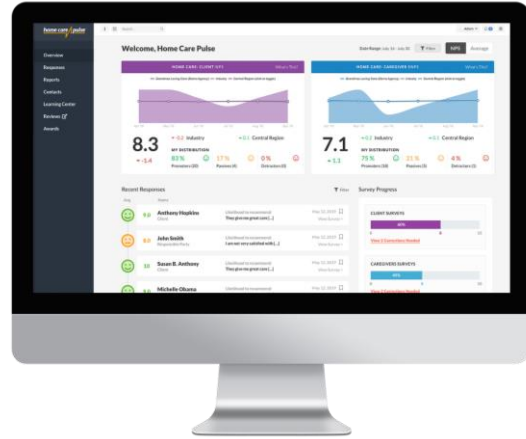


The State of Home Care in Arizona







Two kinds of surveys

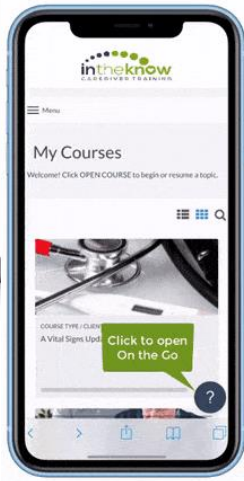
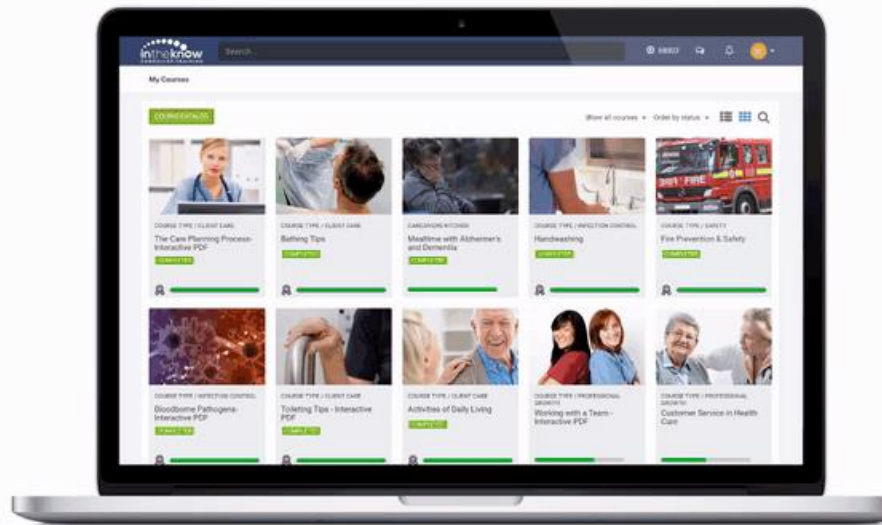


Experience Surveys:

- Data from clients/caregivers
- Experience data
- Ongoing (real-time feedback)
- Agency-specific data with regional benchmarking
- Monthly cost

Benchmarking Study:

- Data from agency owners
- Operational data
- Annual publication
- Industry/regional data on finance, recruitment, operations, etc.
- One-time purchase



- 170+ CE courses, approved in all states
- 20+ courses in Spanish (with more all the time)
- Exclusive 8-Hour Caregiver Training Series
- 12-Module Supervisor Success Series
- 8 Courses approved by the Alzheimer's Association

We're Partners with AZNHA



Member Benefits

- Service Discounts
- State Benchmarking Report
- Free Resources

Experience Surveys & Caregiver Training

Term Length	Discount
15-month	10%
27-month	15%
39-month	20%



What We'll Cover



Underused Growth Levers



Agency Staffing



Caregiver Turnover



What's Next?



Q+A

Growing an agency in 2020: *What's the low-hanging fruit?*

Top 5 Referral Sources for 2019

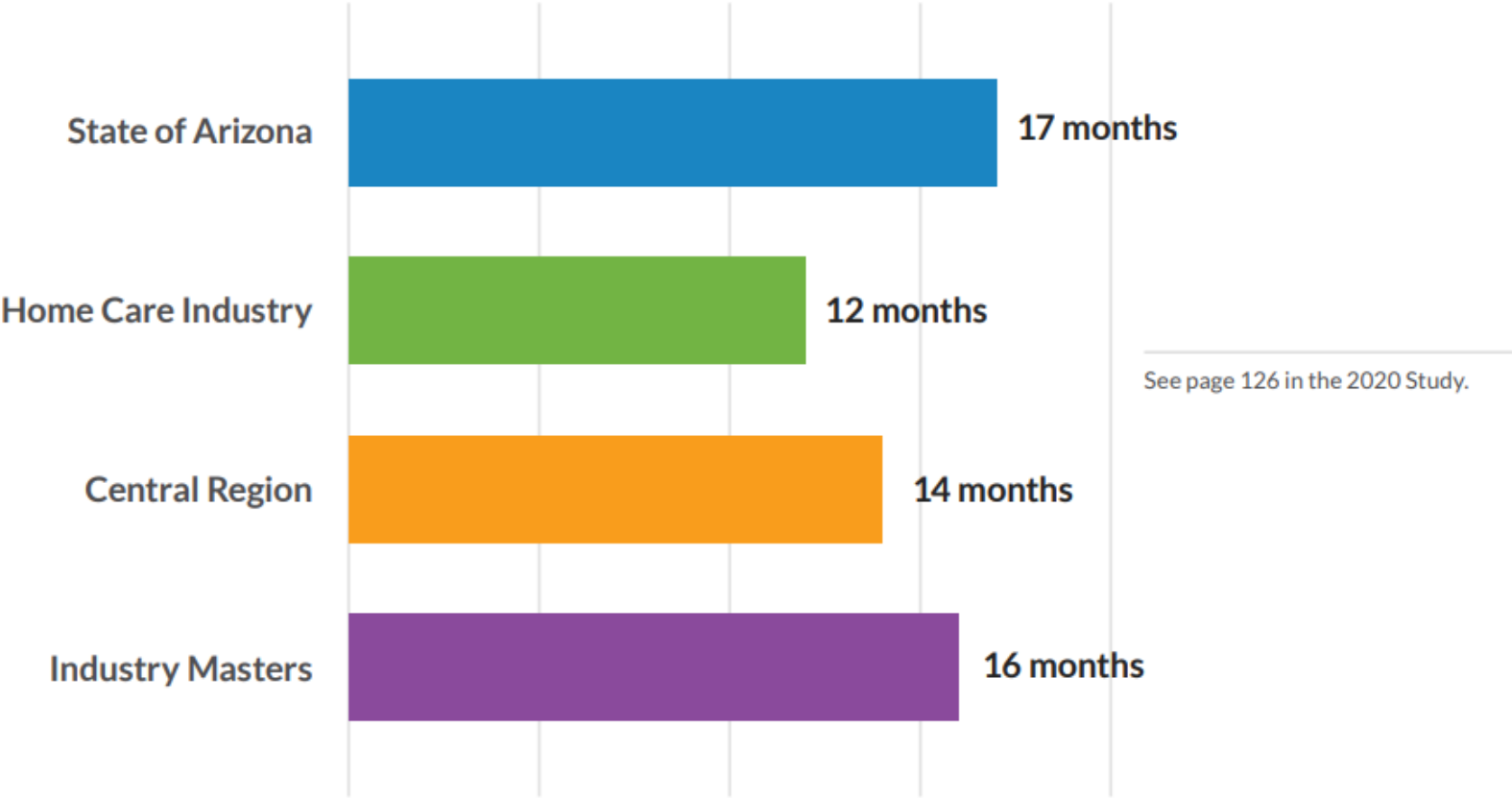
State of Arizona	
1	Clients - Past and current clients and their loved ones
2	Healthcare Professionals - Skilled nursing facilities
3	Healthcare Professionals - Hospital discharge planners
4	Networking - Business networking groups (i.e. BNI)
5	Healthcare Professionals - Assisted Living Facilities

See page 20 in the 2020 Study.

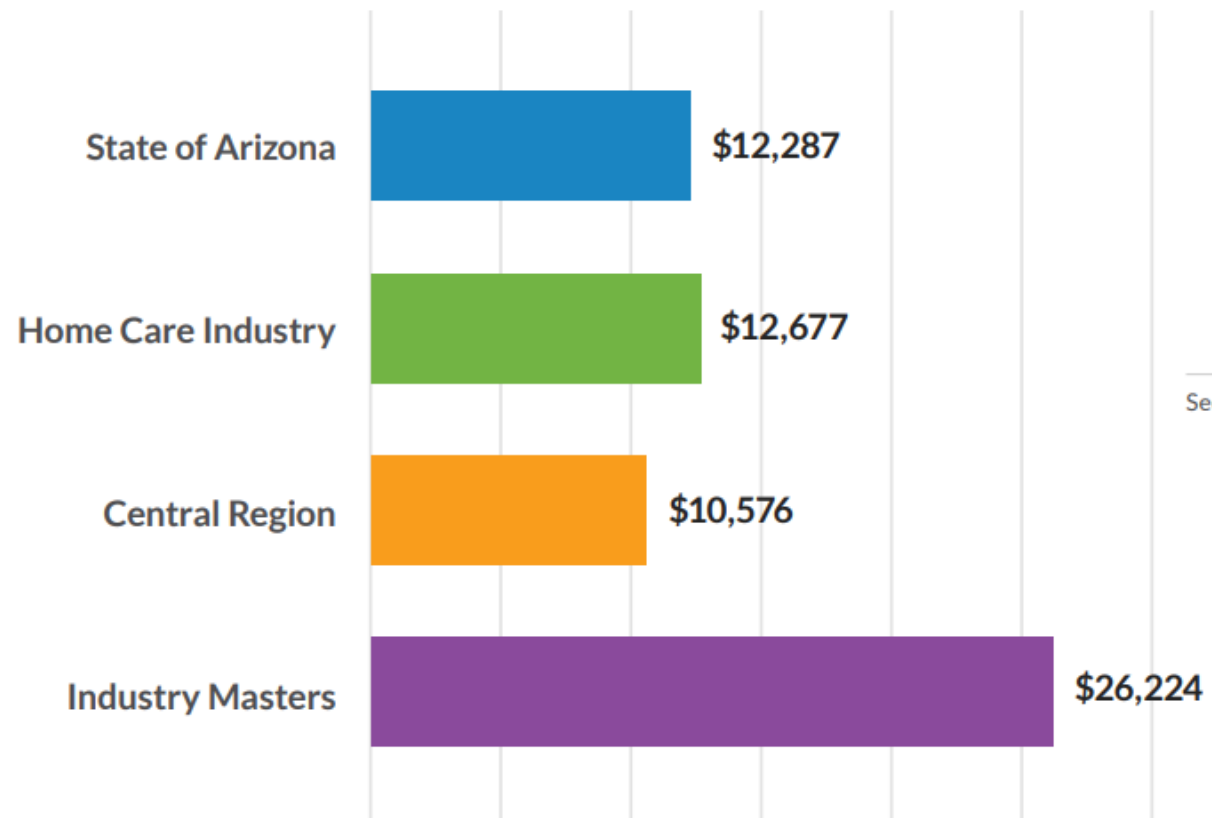
Percentage of Revenue by Payer Source in 2019

Payer Source	State of Arizona	Home Care Industry	Central Region	Industry Masters
Private pay (e.g. check, credit card, cash, etc.)	53.8%	67.5%	68.1%	57.7%
Long term care insurance	19.3%	11.4%	11.9%	13.0%
Medicaid Waiver program	10.0%	6.6%	6.7%	4.6%
Billed Medicaid directly	8.6%	2.6%	3.1%	2.9%
Veterans Administration programs	3.7%	3.6%	4.6%	0.1%
Trusts/banks	2.3%	0.9%	1.3%	8.2%
Workers compensation	1.5%	0.6%	0.7%	0.9%
Billed hospitals directly	0.8%	0.4%	0.1%	0.5%
Medicare reimbursement	0.0%	0.7%	0.3%	7.1%
Medicare Advantage reimbursement	0.0%	0.3%	0.2%	0.9%
Other insurance	0.0%	0.6%	0.4%	2.1%
Area Agencies on Aging (AAA)	0.0%	1.5%	0.7%	0.3%
Accountable Care Organization (ACO) (e.g. bundled payment program, fee for service, etc.)	0.0%	0.0%	0.0%	1.3%
Managed Care Organization (MCO)	0.0%	1.7%	0.0%	0.4%
Other payer sources not listed	0.0%	1.8%	1.8%	0.0%

Client Average Length of Service in 2019



Client Average Lifetime Value in 2019



See page 129 in the 2020 Study.

Reminder:

Only 3 ways to Increase Revenue

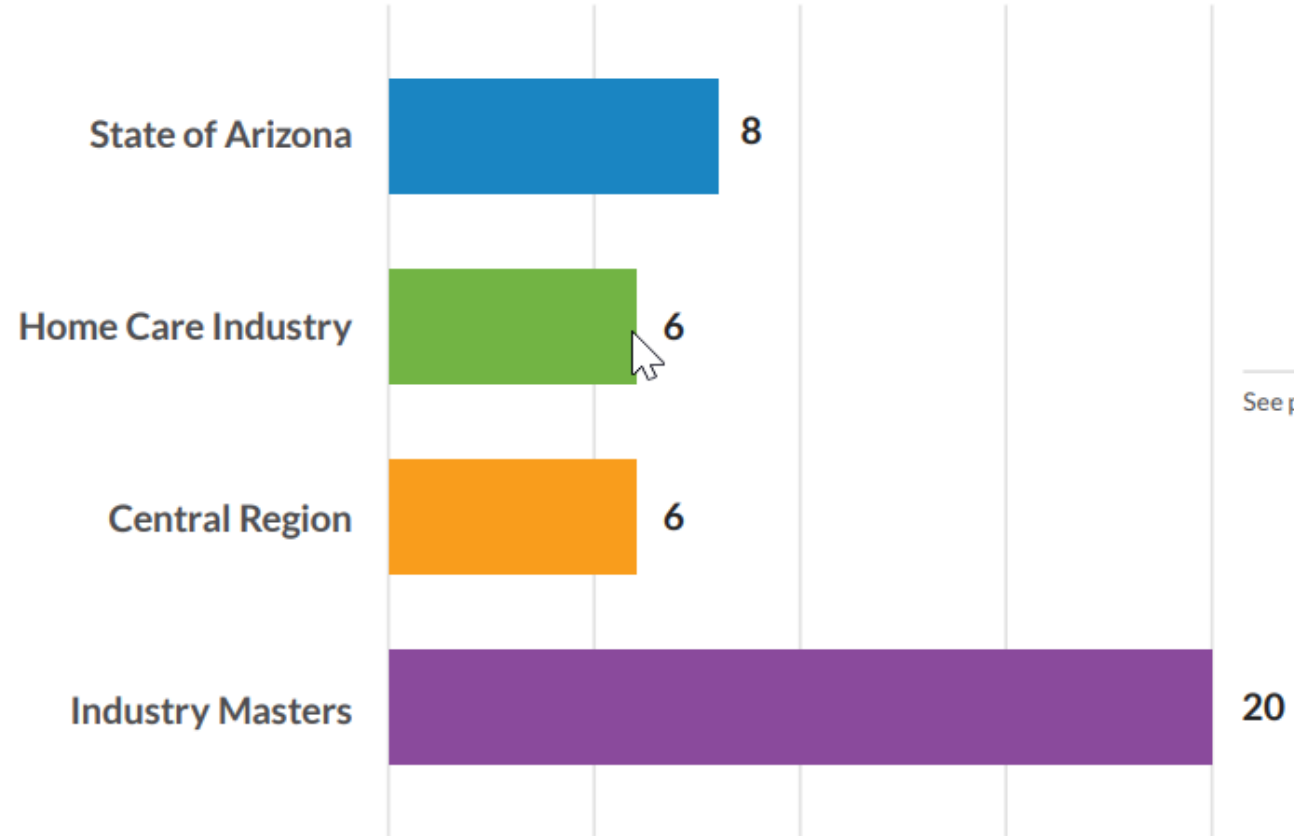
1. Get more clients
2. Make more money per client
3. Retain clients longer

Client retention and client lifetime value are key profit drivers.

Agency admin staffing:

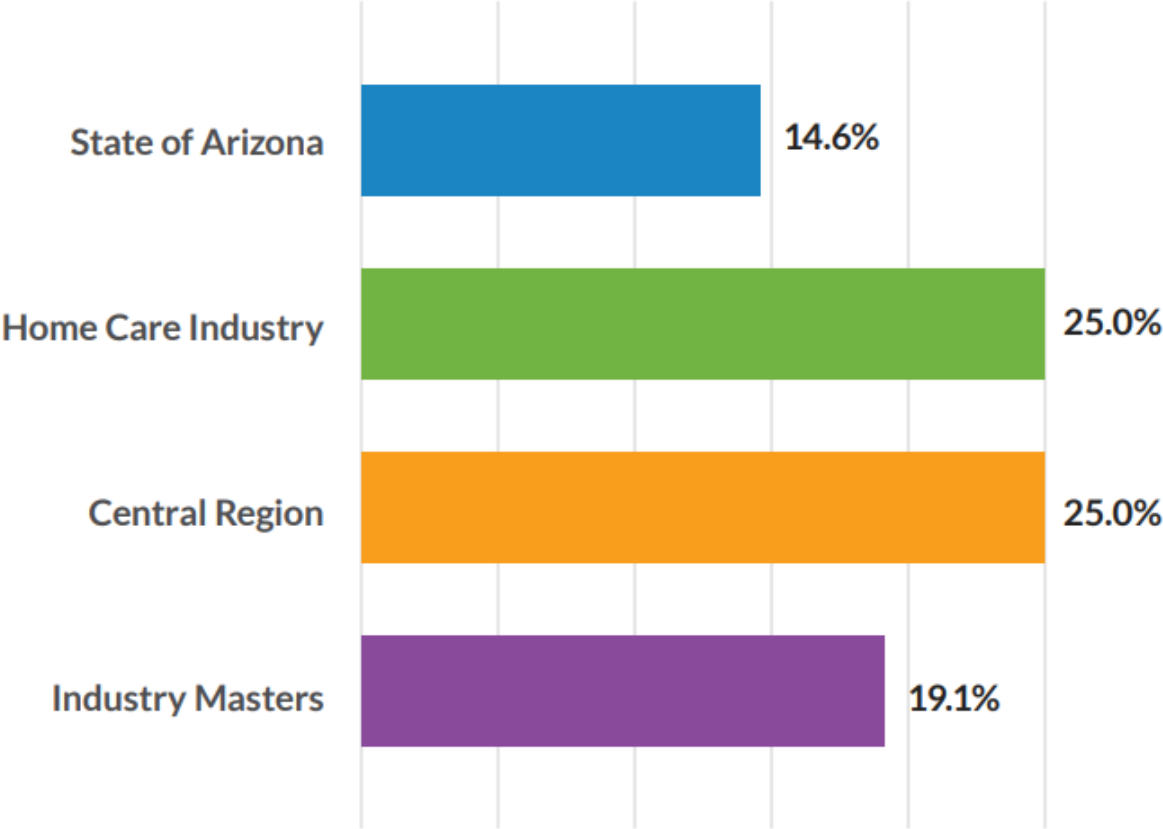
What are the trends, and how can agencies staff efficiently?

Median Number of Office Staff in 2019



See page 136 in the 2020 Study.

Median Office Staff Turnover in 2019



See page 137 in the 2020 Study.

Median Office Staff Salaries

Position Title	State of Arizona	Home Care Industry	Central Region	Industry Masters
Owner	\$92,500	\$80,000	\$75,000	\$134,000
Executive	\$73,500	\$74,200	\$70,560	\$96,700
Admin	\$40,000	\$40,000	\$40,000	\$45,434
Sales Rep	\$55,000	\$50,000	\$50,000	\$72,000
Care Coordinator	\$41,000	\$40,000	\$38,650	\$45,000
Supervisors in the field	\$44,400	\$42,631	\$42,200	\$56,600

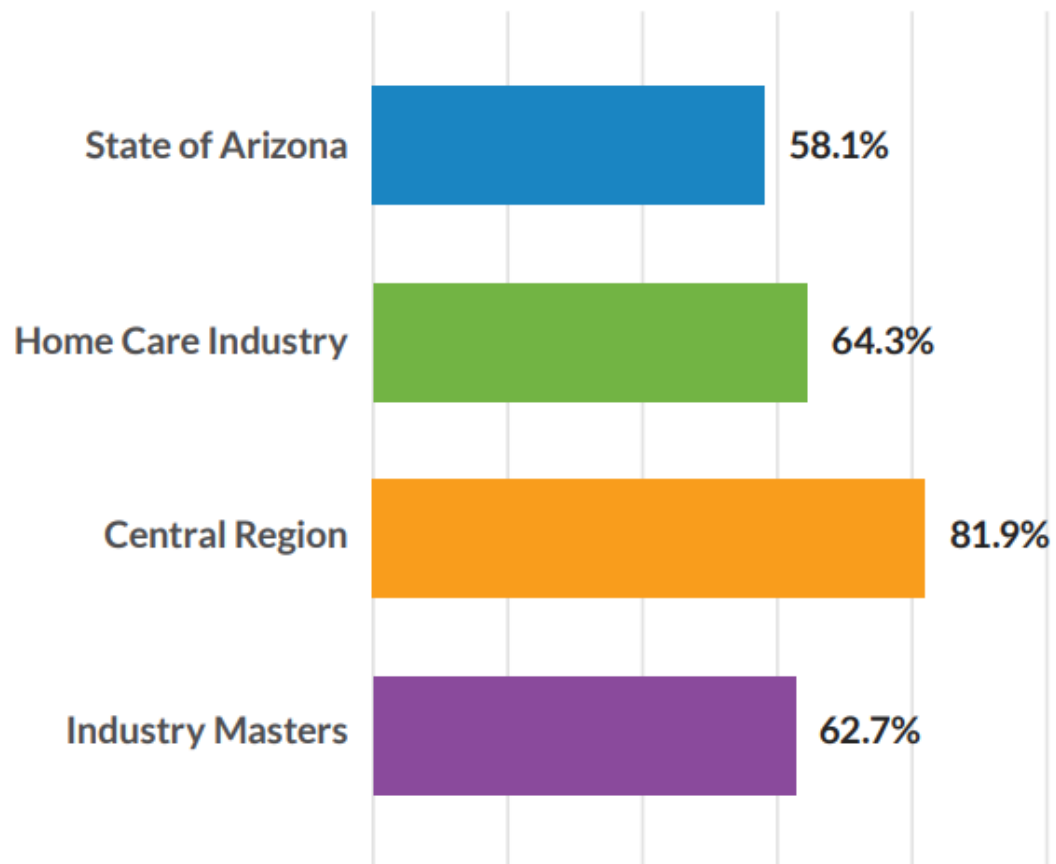
See page 137 in the 2020 Study.

51% of agencies report that they're considering remote options for office staff beyond COVID-19.

Caregiver Turnover:

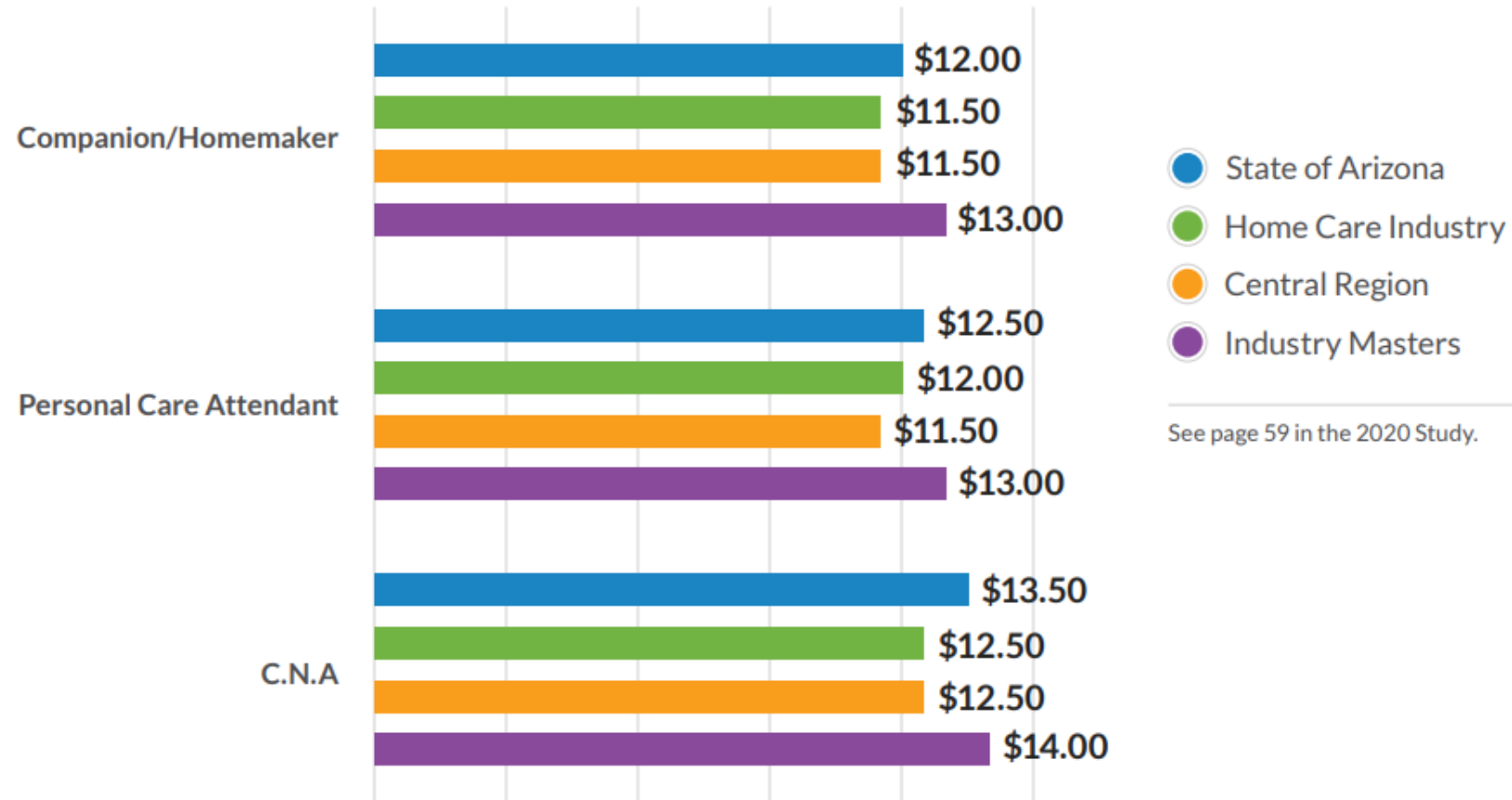
Is it going up or down, and what should agencies expect from the future?

Median Caregiver Turnover Rates in 2019

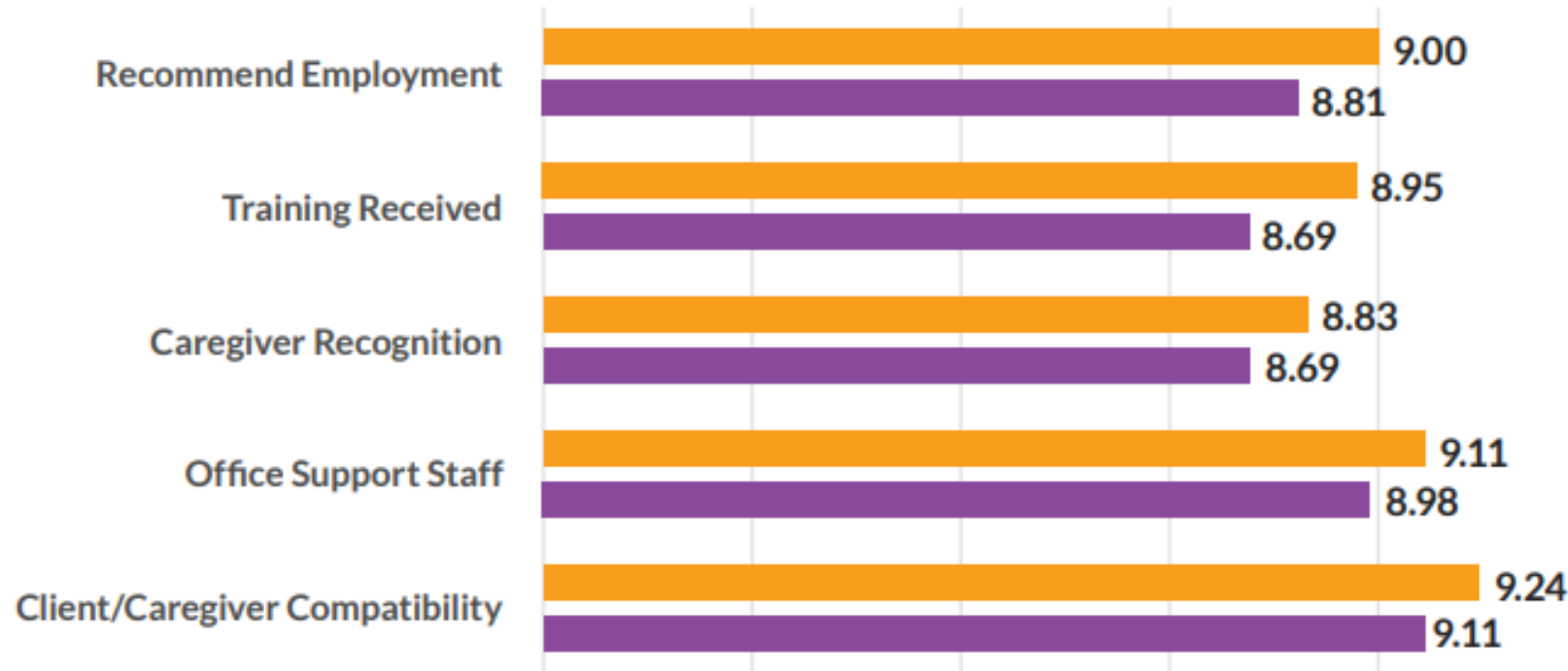


See page 50 in the 2020 Study.

Median Hourly Caregiver Pay in 2019



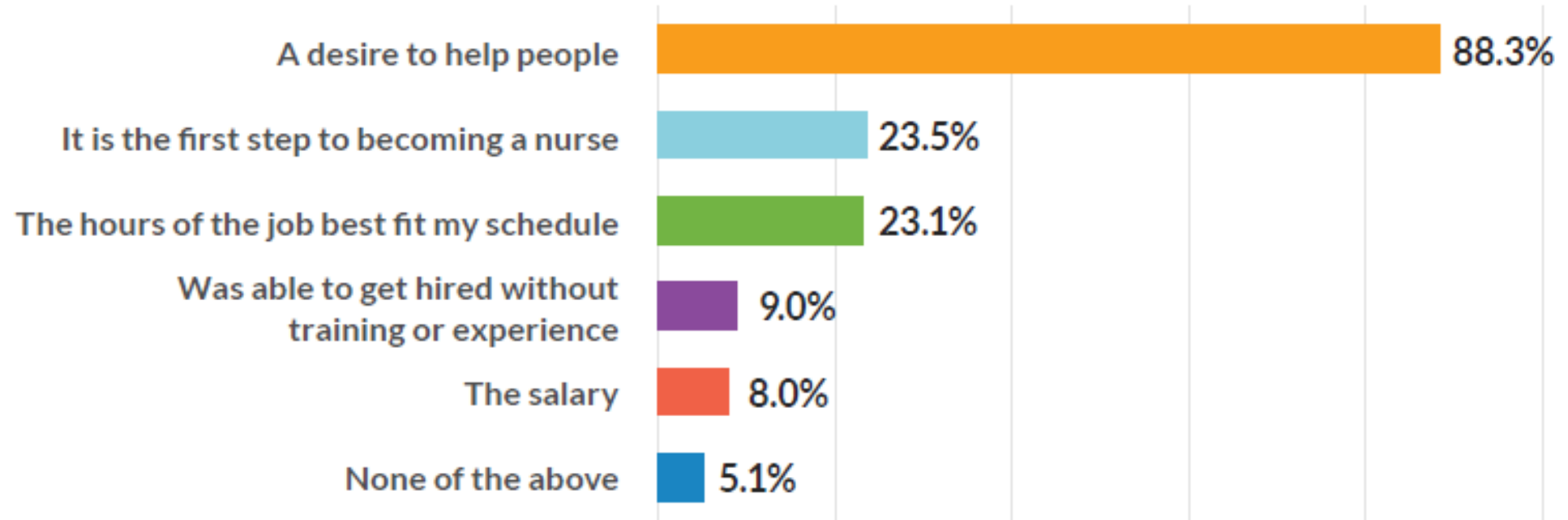
Historical Caregiver Satisfaction Scores – Industry Average



● 2019
● 2018

This data is taken from over 72,000 Home Care Pulse satisfaction surveys with caregivers. Displayed are the average satisfaction scores for the rated categories. Clear Expectations and Openess to New Ideas were discontinued categories in 2019.

What Attracted Caregivers to the Profession?



What's on the horizon for home care agencies?

Innovations that agencies plan to continue after COVID-19

Owner/Administrator working from home – 44% of agencies

Staff members working from home – 51% of agencies

Telehealth – 25% of agencies

Online caregiver training – 41% of agencies

Nontraditional visit formats (*virtual, grocery drop-offs, etc.*) – 48% of agencies

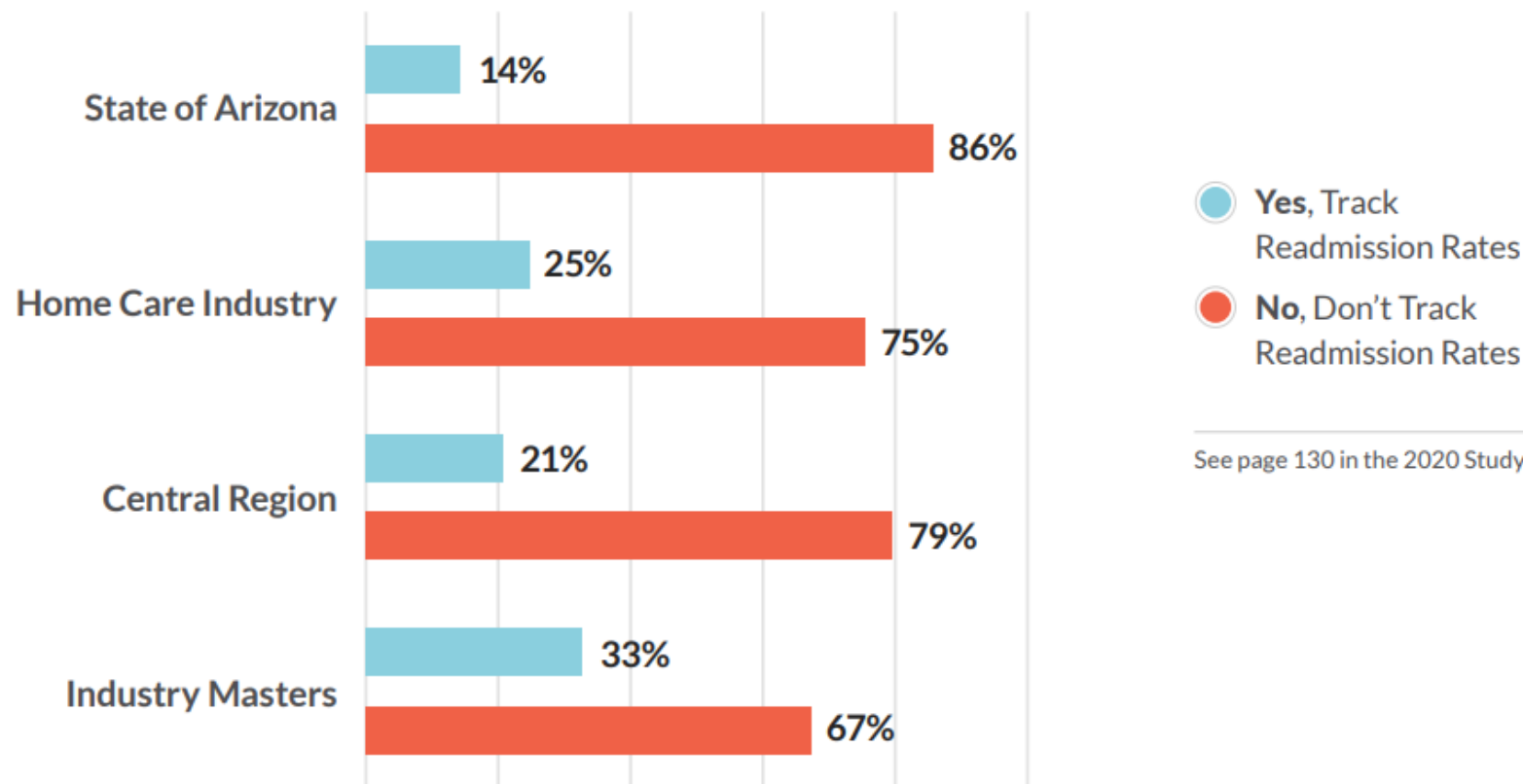
Top 3 Threats Facing Home Care Providers in 2020

State of Arizona	
1	Caregiver shortages
2	Fight for \$15 wage battle (increase in minimum wage)
3	Attracting enough referrals

See page 140 in the 2020 Study.

Survey participants were asked, “What do you see as the top three threats to the future growth of your business in 2020?”

Percentage of Providers Tracking Hospital Readmission Rates for 2019

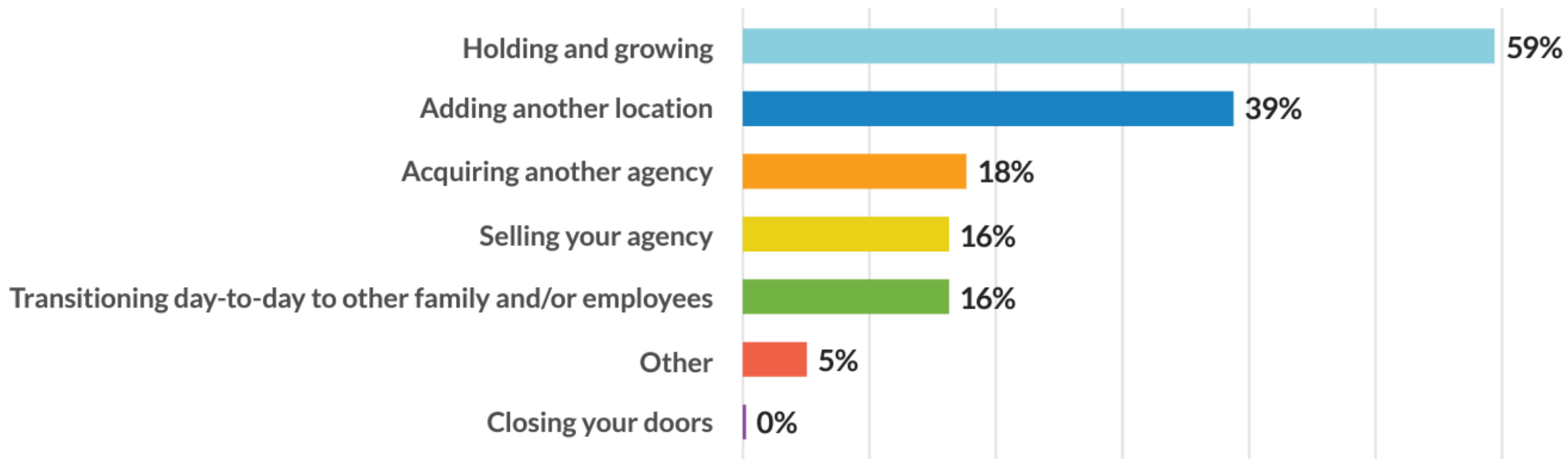


Top 3 Growth Opportunities in 2020

State of Arizona	
1	Strengthening relationships with referral sources
2	Caregiver recruitment and retention program
3	Offering of other service lines

See page 22 in the 2020 Study.

Top Goals Included in Provider's 5-Year Plans



Survey participants were asked, "Which of the following do you anticipate doing in the next five years? Check all that apply." (National Data)



2020 Arizona Benchmarking Report

Reach out to **AZNHA** for a digital copy of the full 2020 VA State Report.





2020 Industry Benchmarking Study

- 175+ Data Points &
- 7 Chapters:
 - Sales & Marketing
 - Recruitment & Retention
 - Finance
 - Operations
 - Technology
 - Client/Caregiver Experience
 - Best of Home Care
- Digital & Hard Copies Available



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Got Questions?

Evan Westensee

evanwestensee@homecarepulse.com

1.877.377.8573 ext. 117