



EDUCATIONAL RESOURCES

 HOME CARE

 HOME HEALTH

 HOSPICE

Building a Culture of Continuous Quality Improvement

Embedding CQI into Daily Operations for Home Care, Home Health, and Hospice Agencies

ACHCU IS A BRAND OF ACCREDITATION COMMISSION *for* HEALTH CARE



Welcome — What We'll Cover Today

- Why CQI matters more than ever in home care
- The operational mistakes agencies commonly make
- The CQI framework used by high-performing agencies
- How to embed quality into daily operations

Lucas Carroll

Founder — The Business of Senior Care

Experience

- Former home care agency owner
- Grew agency to 200+ clients and 225 caregivers
- Worked with 500+ agencies nationwide

Mission

- Help agencies build compliant, scalable care organizations through licensing, accreditation, and operational excellence.

The Demand for Home-Based Care Is Accelerating

- Key trends shaping the industry:
 - 10,000 Americans turning 65 every day through 2030
 - Increased consumer preference for aging in place
 - Rising regulatory scrutiny and CMS quality focus
 - Increased competition among agencies

Quality Improvement Often Becomes Reactive

✗ What Most Agencies Do

- CQI before a survey
- Compliance requirement only
- Once-a-year project

✓ What High Performers Do

- Daily operational discipline
- Proactive improvement
- Embedded in culture

Running a Home Care Agency Is Operationally Complex

- Hundreds of caregiver onboarding steps
- Complex client intake processes
- Incident tracking and reporting
- Scheduling coordination
- Compliance documentation
- Quality monitoring

Operational Consistency Is Hard

Office staff turnover averages 2+ times per role per year

- **This Creates:**

- Knowledge gaps
- Process inconsistency
- Training challenges

- **Systems Provide:**

- Operational stability
- Consistent execution
- Reduced risk

Why Agencies Struggle With CQI

- No defined quality metrics or KPIs
- Limited process documentation
- Leadership consumed by daily firefighting
- Improvement only happens during survey preparation

What Continuous Quality Improvement Means

- A structured approach to:
 - Identify operational problems through data
 - Test solutions systematically
 - Measure outcomes objectively
 - Improve processes continuously

Small improvements made consistently create major long-term impact

Compliance Asks:

"Are we meeting the minimum standard?"

CQI Asks:

"How can we continuously improve outcomes?"

Compliance = minimum requirement | CQI = operational excellence

What High-Performing Agencies Do

- Top agencies consistently:
 - Track operational KPIs monthly
 - Review performance in structured meetings
 - Standardize all critical processes
 - Train staff continuously, not just at hire

Quality becomes part of everyday operations

The CQI Framework

Four Pillars of Effective CQI

- 1 Clear Metrics
- 2 Standardized Processes
- 3 Regular Reviews
- 4 Accountability

Without these four components, CQI efforts usually fail

Pillar 1: Define Metrics

- Every agency should track key operational indicators:
 - Caregiver retention rate
 - Client satisfaction and retention
 - Missed visits percentage
 - Incident and complaint rates

What gets measured gets improved

Example KPI Dashboard

Metrics to track monthly:

- **Operational Metrics**

- Caregiver retention rate
- Client retention rate
- Missed shifts percentage
- Incident rate per 1,000 visits

- **Financial Metrics**

- Revenue growth month-over-month
- Referral conversion rate
- Average revenue per client
- Days sales outstanding

Pillar 2: Standardize Processes

- Every repeatable activity should have a standard process:
 - Caregiver onboarding and orientation
 - Client intake and assessment
 - Incident reporting and response
 - Scheduling and visit coordination

Standardization protects quality

Example: Caregiver Onboarding

✘ Without Standardization

- Missing documentation
- Inconsistent training
- Compliance risk

✔ With Standardization

- Faster caregiver readiness
- Consistent expectations
- Higher care quality

Pillar 3: Monthly CQI Meetings

- High-performing agencies hold monthly CQI meetings reviewing:
 - Incidents and complaints with root cause analysis
 - KPI trends and performance against benchmarks
 - Process breakdowns and improvement opportunities
 - Staff feedback and training needs

Pillar 4: Accountability & Ownership

CQI must have clear ownership

- **Assign responsibility for:**
 - Monthly quality reporting and KPI tracking
 - Leading CQI meetings and documentation
 - Process improvement initiatives
 - Staff training coordination and validation

Embedding CQI into Daily Operations

■ Foundation

- Software systems
- Organizational structure
- Key metrics defined

■ Structure

- Standard operating procedures
- Training programs
- Clear expectations

The Role of Data

- **Data should guide operational decisions:**

- High caregiver call-off rates → adjust scheduling process or staffing ratios
- Client complaints → improve onboarding communication and expectations setting
- Missing visits trending up → evaluate staffing coverage and backup systems

Data reveals operational weakness before they become crises

Engaging Staff in Quality Improvement

Quality improvement cannot be top-down only

- **Engage your entire team:**
 - Care coordinators and schedulers
 - Intake and onboarding staff
 - Supervisors and field staff

“What part of the system keeps breaking?”

The 90-Day Implementation Plan

Month 1: Foundation

Identify 4-6 core KPIs · Document critical processes · Assign CQI leadership

Month 2: Implementation

Launch monthly CQI meetings · Track incidents and complaints · Begin baseline data collection

Month 3: Refinement

Train staff on improved processes · Measure progress · Refine metrics and processes

Common CQI Mistakes to Avoid

- ✘ Tracking too many metrics instead of focusing on vital few
- ✘ No consistent meeting cadence—meetings happen sporadically
- ✘ No process documentation—everything lives in people's heads
- ✘ Lack of staff engagement—CQI stays at leadership level only

Focus on simple systems executed consistently

Demand for home-based care will grow dramatically over the next decade

■ **The agencies that succeed will:**

- Operate professionally and documented systems
- Improve continuously based on data
- Build scalable, resilient operations

CQI is the foundation

About The Business of Senior Care

We help agencies build compliant, scalable operations:

- State licensing and application support
- Accreditation preparation
- Compliance systems and policy development
- Medicaid and VA program enrollment

Trusted by 600+ home care agencies nationwide



Key Takeaway

The best agencies do not rely on heroic employees.

They build systems that produce quality consistency.



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Questions?

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