Participant and Caregiver Satisfaction & Utilization: It All Starts with Onboarding

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What is Onboarding?

“Onboarding, also known as organizational socialization, refers to the mechanism through which new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational members and insiders.”

“Onboarding is the process of acclimating and welcoming new employees into an organization and providing them with the tools, resources, and knowledge to become successful and productive.”

Why implement this employment process with our new participants and their caregivers?
What is Onboarding?

Agenda

Topics:

1. Onboarding...It's not just for Human Resources anymore
2. Why onboard?
3. Onboarding program development
   • The who, what, why, when and how
4. Implementation
5. Feedback and measuring satisfaction
6. On-going support
6. Brainstorming and takeaways
Why Onboard?

Effects of properly onboarding employees:

The impact on satisfaction and utilization

• According to Monster.com 30% of new hires turn over within the first two years of employment. Approximately 46% of new hires leave within the first 18 months at a new job.³

• According to the Bureau of Labor Statistics, the cost for replacing an employee is over 25% of their annual salary (some say 50%).⁴

• The Society of Human Resources found that new employees who participated in a structured onboarding program were 69% more likely to remain at a company up to three years.⁵

• Organizations with a standard onboarding process experience 54% greater new hire productivity and 50% greater new hire retention.⁶
Why Onboard?

Effects of onboarding participants and caregivers

Positive Outcomes for Satisfaction & Utilization

- Active engagement in healthcare management
- Recruitment and retention
- Increased marketing outreach and enrollment
- Relationship development
- Decrease unnecessary utilization in:
  - ER visits, hospitalizations & re-hospitalizations
  - Skilled and non-skilled rehab/nursing home
  - Homecare hours
  - Specialist visits
  - DME
- Improved understanding and navigation of the PACE program as insurance and provider
- Assimilation into your organization’s culture and creation of PACE advocates
- Clarification of participant and organizations expectations, roles and responsibilities
- Greater regulatory compliance
- Improved participant support
- Formal and consistent feedback systems for quality improvement
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No plan, No goals… No positive outcomes

- Build a vision of your onboarding program
- Develop a plan, establish goals and build your program
- Determine what information and activities are important to your goals
- Anticipate identify and remove potential roadblocks
- Design a continuous feedback and improvement process

Determine the who, what, why, when and how of your onboarding program
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Onboarding cycle

- Ongoing Support & Education
- Active Program Engagement & Assimilation
- Satisfaction & Utilization Outcomes
- Onboarding Program Development
- Current Staff, Participant & Caregiver Engagement
- Program Implementation
- Staff, Participant & Caregiver Feedback
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“Who” questions to consider...

Who is your audience?

Who will be on your program development team and what onboarding roles will they play?

Who are your participants and caregivers that will be involved with the program development and facilitation?
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Planning

Know your audience

• Make it personal. Be aware of background information, current situation and needs as well as special individual information that you can engage with them with information that relates directly to their personal situation.
• Determine their level of knowledge about your program and PACE.

Know your team

• Assess the abilities of your team members involved and determine the roles that each can play in the process

Know your participants and caregivers

• Identify those who will champion your program
• Develop roles within the onboarding process
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Planning: “What” questions to consider

**What** are your goals?

**What** is your organizational message?

**What** is the structure of your program and information session facilitation needs?

**What** information/content is important to share?
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Planning

Onboarding goals

- Identify your satisfaction and utilization issues
- Determine short term and long term goals
- Benchmarks
- Data gathering methods

Organizational message

- Purpose of your organization
- Find out your current message and staff promotion of that message
- Create ownership through team and participant/caregiver involvement
- Staying current on your message.
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Planning

Structure

- Pre-enrollment
- First day of center attendance - welcome
- Information sessions, assessments and care plan development
- Create center involvement opportunities
- Formal and informal supports
- Follow up and feedback
- Improvement implementation
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Planning

Facilitation

• Set the agenda and expectations
• Information sessions space with no interruptions.
• Provide all staff onboard training.
• Provide written educational session materials upon enrollment
• Present information in varying forms
• Peer involvement in reading and presenting information
• Implement guidelines - group ground rules, addressing individual specific issues
• Plan time throughout formal information sessions to absorb what is presented, to ask questions and provide feedback.
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Information/Content

- Develop content from staff, participant and caregiver perspective
- General information about the organization
- Code of conduct, descriptions of processes and roles and responsibilities of the staff and clear expectations of one another.
- Include fact sheets, contact information, glossaries, initiatives and various committee information.
- Values and mission of the company/program, how decisions are made, how problem solving is done and what defines success.
- PACE and organizational navigation
- Legislative news, PACE organization news as well as national and local consumer advocacy organizations.
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Planning: “Why” questions to consider

**Why** onboarding?

**Why** does your staff work for your organization and why do they stay?

**Why** did the participant/caregiver join the program?
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Planning

**Reason for onboarding**
- To meet a special need, address an issue, improve overall satisfaction and utilization
- To meet your mission – write down why your doing it so everyone knows
- Get out your message
- Improve satisfaction and utilization

**Reasons for your staff retention or lack of retention**
- What is your current turnover rate?
- What gives them job satisfaction?

**Reasons for joining your PACE program**
- Why did they join your program?
- Assess your participant and caregivers needs
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Planning: “When” questions to consider

When and where will your sessions be held?

When will your onboarding begin and end?

When will you do your team planning?

When will you provide training to staff?
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Planning

Logistics

• Determine the optimal space for information sessions, trainings and 1-1s
• Room flow and seating
• Needed materials and equipment
• Determine the optimal time and frequency for training and key engagement opportunities
• Meals/snacks
• Presentation materials
• Staff assistance
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Planning: “How” questions to consider

**How** will you manage expectations for your new participants and caregivers?

**How** will you reinforce your information and message?

**How** will you foster engagement and introduce organizational culture?

**How** will you obtain feedback and measure the satisfaction of your participants and caregivers?
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Planning

Managing expectations

• Set expectations. Anticipate issues and needs
• Model and educate about the values and mission of your program, how decisions are made, how problem solving is done and what defines success.
• Make sure they understand any informal rules and guides to be able to navigate the organization.
• Provide support and regular interaction with new members and caregivers
• Consistent message about the role of the participant and caregiver
• Solicit feedback from staff, peers, participant and caregiver if expectations are being met
• Always follow through
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Reinforcement opportunities

• Staff should be visible and reinforcing onboarding information

• Reinforce information during individual 1-1s, participant groups, educational sessions or other IDT interactions such as assessments and appointments to provide information, answer questions, reiterate, and solicit feedback.

• Rotating schedule of phone or in-person check-ins with the participant and caregiver throughout the week/weekends

• Provide written reminders information at the center or through the mail/email
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Organization engagement and PACE culture assimilation

• Team-building
• Help the staff and participant achieve early wins
• Create a “Buddy“ program
  — Assign each new participant a participant “buddy” to help the transition into your PACE program.
• Recognition of their contribution also is needed to solidify the relationship between the participant and your organization.
• Inform the new participant and caregiver where he or she can help support your mission and where opportunities exist to support your program
• Invite new enrollees to future onboarding sessions.
• Encourage involvement in center groups, committees and programming
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Planning

Obtaining feedback & measuring satisfaction

• Pre- and post-meeting recommendations - debriefings
  – Analyze strengths and weaknesses
  – Identify learning and development opportunities
  – Reassess goals and expectations

• Review onboarding satisfaction and utilization goals
  – Discuss feedback with your team
  – Identify program challenges, opportunities and improvements
  – Implement changes

• Develop surveys
  – Establish a baseline - expectations, understanding and wellness
  – Post information sessions, 90 day and 180 day
  – Monthly/quarterly topic driven and annual surveys
  – Content regarding comprehension, satisfaction and utilization
  – Provide surveys at information sessions, participant and caregiver groups
Your onboarding program:

Ongoing support

“Support” is defined as facilitating full participation in shaping activities by providing opportunities to expand content knowledge, addressing questions or interpersonal issues, and raising awareness among other stakeholders about the value of consumer perspectives.

• **Determine formal communication methods for continued engagement**
  - Periodic reinforcement of available resources
  - Continue providing organizational and process information
  - As-needed support for individual participants and caregivers
  - Ongoing “Buddy” involvement
  - Create peer-to-peer learning opportunities
  - Specialized programming and leadership opportunities
  - Recognition
  - Opportunities to provide feedback
Participant and Caregiver Satisfaction & Utilization: It all starts with On-Boarding

Questions to consider:

Brain storming

1. What does your organization currently do for orientation/onboarding?
2. What do you think are the top 5 important pieces of information during onboarding?
3. What are your organizations top 3 utilization challenges?
4. What are your top 3 satisfaction challenges?
5. Give 3 goals for your onboarding program?
6. What are 3 different ways to foster new participant and caregiver active engagement and/or assimilation during the first 6 months of enrollment?
It all starts with onboarding.
Citations:


a_guide_to_building_consumer_orientatation_materials_12-089---fnl.pdf