Howdy!

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Respite Services – Creating your program’s operational dashboard

• Business functions (not outcome/impact)
• Essential management tool
  • Leadership team
  • Board of directors
• Holistic approach – align with outcomes/impacts
• What is important to key stakeholders?
  • Funders
  • Regulators
  • Participants/family caregivers
  • Referral sources
  • Coalition members and partners
• Homework: individually prioritize – “less is more”
Respite Services – Key Operational Indicators

• Marketing, Outreach, & Accountability
• Workforce Development
• Health and Safety
• Legal
• Finance – Costs and Resources
• Technology
• Diversity
Marketing, Outreach, & Accountability

• Population(s) served – demographic/other targets vs. referrals & enrolled
  • Caregiver and care receiver

• For clients & for volunteers

• Referral sources (the three “R’s”)
  • Total number of referral sources
  • Reliability rating (ongoing outlook for continued support)
  • Relevance rating (% of referrals that convert into enrollment)
  • Responsiveness rating (feedback from referral source survey)

• Conversion
  • Inquiry to visit/interview (%)
  • Visit/interview to enrollment (%)
  • Inquiry to enrollment (%)
  • Time from inquiry to enrollment
Marketing and Outreach (Continued)

• Feedback
  • From non-enrollees. What were their concerns?
  • Post-enrollment 3 month or 6 month follow-up
  • Both clients/participants and family caregivers/support systems
    • Net promoter score (How likely are you to refer others?)

• TWO marketing-related “targets” – new enrollees & current participants
  • Utilization
    • “dose” and “duration”
  • Average daily/weekly utilization
  • Average length-of-stay
  • Service refusal, no call/no shows
Workforce Development

• Staff profile
  • Full-Time Equivalents (FTE’s)
  • FT vs. PT staff
  • Staffing ratios
  • Volunteers
  • Temporary staff

• Recruitment
  • Response times
  • Relevance rating
  • Cost per hire

• Staff engagement
  • “Pulse” surveys

• Training/education

• Succession planning
  • Retirement zone

• Turnover/Tenure
Health and Safety

• Incidents
  • Critical incidents vs. “near misses”
  • Categories (care process, medication, physical environment, behavioral, etc.)

• Internal/external evaluations and audits
  • Compliance/conformance
  • COVID-related (donning/doffing/discarding, hand washing, heavy-use surfaces)
  • Water temperatures
  • Food temperatures
Legal

• Complaints/grievances
  • Care recipients, participants, family caregivers/support systems, personnel, others
  • Total number
    • By participant, by employee
  • Categories (care process, physical environment, activities, etc.)
  • Response time (to acknowledge, to resolve)
  • Formal complaints vs. concerns

• Mandatory reporting

• Pending litigation
Costs and Resourcing

- Costing template for respite of care, participant types
- Unit cost vs. reimbursement
- Discounts vs. “sliding scale”
- Break-even point
  - Fixed vs. variable costs
- Diversity of revenue streams

https://archrespite.org/library/cost-analysis-for-respite/

https://friendsnrc.org/evaluation/cost-analysis/
• System/network availability
• IT help desk request volume
• Security systems
  • Malware scans completed
  • Attacks on firewall prevented
  • Phishing simulation emails
• E-newsletter
  • Total distributed
  • Bounce-backs
  • Open rates
  • Click-through rates
• Social Media
  • Likes/shares/views
• Web related
  • Page load times
  • Site visits/page visits
    • Total visits vs. unique visits
    • Average time on site/on page
Diversity

- Broadly defined (racial, ethnic, gender, LGBTQ, age, diagnosis, military/Veteran, religion, etc.)
  - Social determinants of health
  - Correlation to other measures?
- Service delivery area
- Marketing/outreach analysis (print materials, website)
- Personnel profile
- Participant profile
Next steps. . .Indicators in Action!

- What is currently being tracked?
- Identification of priority KPI’s
  - Discussion tool/exercise
  - Leadership team, other key stakeholders
- Integrated with other plans & planning efforts
- Dashboard development & dissemination
Thank you!

Any questions?

You can reach me at:
(thru October 2023 😊)

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