

# Home Health Line's Success In Home Care®

OPERATIONAL & CLINICAL SOLUTIONS FOR HOME HEALTH EXECUTIVES

## Home Care Forecasting

*You Have the Tools & Data  
to Predict Future Success*



**Plus**

- **Expand Physician CEUs and Increase Referrals**
- **Use NPs to Build New Business Line**
- **Tame the Wireless Wolf**

# Rev Up Your CEU for Continuous Marketing

by Merrily Orsini, guest editor

**T**ake your continuing education program to the next level and you'll not only garner 10% to 15% more referrals on average, you'll also bring in thousands of dollars in new revenue. That's what my clients are finding when they make four key upgrades to their CEU program:

1. Increase frequency of seminars.
2. Widen scope of topics.
3. Partner with local facilities for maximum exposure and return.
4. Hire an experienced, knowledgeable and professional presenter.

The truth is, your competitors are getting more sophisticated in their marketing, and you've got to rev up your own marketing engine if you hope to stay ahead of them in the referrals race.

## Keep the training wheels rolling

The best change you can make to your community outreach and education programs is to make certain that you are offering helpful and resourceful information. Then ramp up their frequency. You're just not going to get new business from one-shot, single-topic training sessions.

You need a continuous, ongoing program that has multiple sessions being marketed and provided every month. This kind of long-term approach helps you build relationships with your attendees, gaining their respect for your clinical expertise and your business processes.

My recommendation: offer as many as three sessions per week, and have flyers on the street several times per month to bring in attendees. My clients who have done so report referral increases of anywhere from 10% to 15%.

And here's an unexpected bonus you could earn for your efforts: more than \$65,000 per year in new revenue. That's how much Freedom Eldercare, a licensed home health and geriatric care management agency in Hackensack, N.J., has brought in over the past year through its total of more than 25 courses that it's offered more than 100 times.

The agency has developed a reputation for good speakers and expert information, and has grown its training programs far beyond any of its initial expectations.

Education and training, however, are philosophically aligned with Freedom's mission, so, not only does it fuel the agency's business growth; it also creates a marketing outlet that complies with the company's goals.

Here are some ways to get your marketing engine in gear and get your training course frequency ramped up:

- **Have marketing reps return to each facility** after you've provided your first presentation, offering to schedule other dates for a repeat of the same seminars or other topics. And, if you can, have handout materials for upcoming sessions to give to present attendees.
- **Have at least one marketer participate in each training session.** Particularly when the seminars are hospital-based, your marketing rep may be allowed access to hospital floors that usually are off limits.
- **Have the marketing rep call each attendee** after the session, asking for some face time to give them a little more information about the agency and services it might provide in addition to the training.
- **Hit on all marketing cylinders.** Don't just rely on the old standby — mailing out flyers (although you should do this, of course). Also have your marketers distribute flyers through hospitals, churches, senior centers, community centers and other gathering places. And have them make phone calls — sometimes a quick call to a physician's office manager or hospital HR department can garner you a half-dozen attendees or more.
- **Use the Web site for marketing** and create an online sign-up form that allows for email blasts for each seminar as well as builds a lasting database of contacts
- **Use the Web to post session dates** and sign-up information.
- **Use local, neighborhood and facility publications** and give them enough tantalizing information to have sessions listed with blurbs about presenters and the company presenting.

# Programs



Your biggest expenses will be for a staff member to organize the sessions, create the marketing materials and present the courses themselves. My clients find they spend an average of about \$1,000 per training session on staff time for writing the training and securing the CEUs, along with about \$250 for designing the PowerPoint presentation. If you're supplying the marketing materials and presentation supplies then the additional design, copies and mailing costs could go as high as \$500, depending on quality and quantity. *(For a breakdown of the specific expenses and tasks associated with running a multi-pronged training program, see box, below).*

### Widen scope of training topics

Another big key to garnering more referral source interest in your training program is to create a longer list of varied topics. The usual home care topics are fine but don't always get your referral sources jazzed up to attend. So try setting up some sessions on non-home-care topics that

address other areas where your referral sources need help.

For example, Freedom Eldercare created a management-specific customer service training course for hospital and assisted living executives. Barbra London, Senior Vice-President of Operations & Education, is oftentimes referred to as "The Seminar Queen" and is the main reason that Freedom gets requests for specialized training.

She came to Freedom Eldercare with an established reputation as an entertaining and informative presenter. This hospital-based course positions Freedom Eldercare squarely in the facility from which it hopes to gain referrals.

In fact, one client, Holy Name Hospital in Teaneck, N.J., requested the customer service seminar for all of its 200+ managers, supervisors and department heads. They represent more than 80 departments including nurses, dietitians, social workers, respiratory therapists, day care, billing, pharmacy, and radiology — a wide range of professions and educational levels.

## CEU Workshop Logistics 101

Here's a quick primer to create and present a continuous, multi-pronged program of CEU and community training courses:

### Timing

- Worst months are February (too cold) and August (too hot and too many vacations scheduled)
- Best days are Tuesday, Wednesday, Thursday for CEUs
- Best to do evenings and weekends for community informational workshops

### Frequency

- No more than 3 a week
- At least once a month
- It may be best to book and file possibly 20 workshops in advance. (This is easily achievable especially if you already have a list of confirmed topics, speakers, locations and dates.)

### Staffing

- Pre-planning can take 10 to 15 hours
  - Identify the topics (brainstorming & staff time varies)
  - Secure speakers (if outside experts used for community workshops)
  - Secure locations (unless partnering with a facility)
  - Coordinate sponsors
  - File for CEUs
- On-site event support may take additional staff

### Materials (presentation, handouts)

- If partnering with a facility, eliminate the administrative time or expense of copying by sending materials to the sponsor to make the copies

### Equipment

- Computer for PowerPoint with projector

### Identifying sponsors

- Hospitals, assisted living, retirement communities and other congregate living resources.
- Good targets are places that need to inform:
  - Social workers
  - CALAs (Certified Assisted Living Administrators)
  - LNHA (Nursing Home Administrators)
  - CCMC (Nurse Case Managers)

### Speakers

- Must be dynamic
- Must be experts in the subject

### Budget

- Writing time is the biggest expense: it means taking staff away from other duties and can take up to 20 to 30 hours per topic
- Filing time for the CEUs can be several hours of staff time
- The expense of the CEUs: cost of an hour is \$100 in New Jersey and varies by state

### Filing for CEUs; Each state has different guidelines for filing for CEUs:

- Learn the processes and deadlines
- Check regularly to ensure that credentials are still current and CEU offerings are valid
- Generally, there is a 90-day waiting period for either entity to review and return

### Marketing: Give adequate lead time — about six to eight weeks in advance of the event

Many other referral sources are responding in the same way — Freedom Eldercare keeps its number of training sessions around 100 to 150 a year since it started offering the community and CEU training three years ago.

Other non-home care topics with which Freedom is having success:

- **"People Who Push Our Buttons"** seminar, which teaches healthcare professionals how to deal with difficult people. Clients like this topic because it does double duty — their staff can use it for their work life, with people they supervise or with the public, and in their home life with their families and friends.
- **Spirituality and Aging.** This course provides an overview of the role of religion, faith, belief systems and organizations, which have an effect on the bio/psycho/social aspects of life as clients age.
- **Sexuality and the Elderly.** This course provides a clinical overview of the physical, behavioral, psychological and social aspects of sexuality as it pertains to the aged.
- **"Understanding and Meeting the Needs of the Aging LGBT Communities."** An estimated 1.75 million to 3.5 million Americans aged 60+ are gay, lesbian, bisexual or transgender. This seminar examines related issues and includes a special focus on senior living communities and facilities.

*(For more topics, see box, p. 28)*

### Find local training partners

The final piece of the puzzle is finding facility-based partners with whom you can share the training burden, while still reaping the referral rewards.

The reasons for this are two-fold: 1) Your partners can help get your marketing materials to a much wider

## Obtain the Right CEUs for Varied Attendees

Most agencies know how to get approval for CEUs for physicians and nurses (through the AMA, ANA or local medical groups). But it's harder to determine where you should go for other healthcare professionals' credentials. Here are three key attendees you should get coverage for (and how to go about it):

### Social Workers:

You can apply to the National Association of Social Workers (NASW) to offer CEU programs (workshops, conferences, home study programs and Internet-based distance-learning).

Sponsoring organizations must return sign-in/sign-out sheets (or alternate attendance method) to NASW 30 days after completion of each program, along with summary evaluation data.

Certificates are issued either by the provider or by NASW (for a fee of \$10 per certificate). There is a one-time application fee of \$110 for all new providers, with costs for programs themselves of \$185 for one program, \$725 for up to five programs, or \$1,075 for up to 10 programs (all new or renewal). The rate for conferences is \$285 each.

For more information, go to: [www.socialworkers.org/ce/approval/ce\\_application0506.doc](http://www.socialworkers.org/ce/approval/ce_application0506.doc)

### Certified Case Managers (CCMC):

You can obtain CEU credits through the Commission for Case Management Certification [www.cmccertification.org](http://www.cmccertification.org). Approval requirements include the following:

- Program must be no less than one clock hour in duration (60 minutes of instruction time excluding breaks, social hours, meals, etc.).
- Focus of the program must be to increase the participant's knowledge of or skill in the practice of case management.
- Purpose of the program must be clearly defined in terms of expected outcomes/learning objectives.
- Program must include an evaluation component (of the program's value — not an assessment of the participant's learning skills) completed by participants.
- All programs must be held in accessible, barrier-free locations so that no one with a disability is excluded from participation.

Approval must be obtained/granted for each program/activity. Applications must be postmarked 60 days prior to the initiation date of the program to guarantee review and approval.

Fees are \$50 per program/activity (standard approval category) or \$50 per quarter (for employers providing in-service training). For more information, go to: [www.cmccertification.org/download0606/CCM\\_Organizational\\_Approval\\_Guide\\_0606.pdf](http://www.cmccertification.org/download0606/CCM_Organizational_Approval_Guide_0606.pdf)

### Certified Assisted Living Administrators and Licensed Nursing Home Administrators:

The credentialing bodies and standards vary by state. The following are details for New Jersey: Complete the Sponsor Application for Continuing Education Program Approval for Licensed Nursing Home Administrators and submit for review at least 15 days prior to a board meeting (held on the second Thursday of odd-numbered months).

Cost is \$25 for less than three hours, \$50 for three hours or more. Incomplete applications will not be reviewed. They also do not approve programs retroactively. For more information, go to: [www.state.nj.us/health/forms/nh-5.pdf](http://www.state.nj.us/health/forms/nh-5.pdf)

audience, increasing attendance and your presence in the community; and 2) the facility often is willing to host the session, refreshments and other expenses, reducing your costs.

And the benefits are clear: My clients who've made the effort to partner with facilities find their session attendance soars by 50% or more, and their referrals from the facility itself also grow.

In fact, Freedom Eldercare recently signed a contract to be a preferred home health provider to an upscale residential facility. This relationship started earlier when London was a

practicing geriatric care manager but was enhanced when Freedom offered CEUs attracting nurses, social workers and nursing home and assisted living administrators. The seminars provided an opportunity for the residence staff to have more insight to and gain respect for the ethics and standards Freedom Eldercare uses for their staff and caregivers.

But all this doesn't just happen with a few phone calls. Establishing these relationships requires a focused, strategic effort to cultivate contacts at assisted living facilities, hospitals and other resident centers.

The best sales pitch is the simplest: hosting the session

## Wider Scope of Topics Brings in Bigger Audiences

Step outside the home care box and you'll find fertile fields for your CEU training program. My clients have found their attendance (and referral source interest) skyrocketed when they stopped focusing only on "Wound Care 101" and "How to Manage CHF Patients."

The most popular and most often requested workshop offered by Freedom Eldercare is "People Who Push Our Buttons: How to Deal with Difficult People." We all deal with difficult people, both in terms of our colleagues and our clients, so there is always an interested and receptive audience. This particular workshop offers specific management tips such as:

- Slow down
- Count to 10
- Recognize the triggers to anger
- Understand that anger is an emotion, and as such, can be controlled
- Know that there are certain types of people who push your buttons automatically and you don't even know why — they may remind you of your mother or your obnoxious uncle
- How to really listen to people

This seminar alone has earned Freedom about \$50,000 over the past 3 years and was written in just an hour.

In total, Freedom has more than 25 approved CEU classes in New Jersey, and continues to create more CEU classes as well as community seminars and in-service programs based on requests and changing resources and information in the geriatric service provision area.

Some other CEU offerings are:

### ■ **Sensitivity to Cultural Diversity in the Elderly.**

Today's aging population is more diverse than ever in terms of race, gender, sexual orientation, ethnicity and language, immigration history, socioeconomic levels and education. This course provides geriatric clinicians with an understanding of the effects of cultural components and includes cultural theoretical frameworks, practice assessment, interventions, evaluation and research methodologies specific to elderly minorities, their families and communities.

### ■ **Everyday Ethical Dilemmas in Geriatric Care.**

Through increased longevity of the geriatric population, critical life and death health choices are being made every day. This course explores ethical principles such as self-determination, autonomy, paternalism and informed consent, as witnessed in everyday life.

Non home care-specific workshops are proving highly successful when presented and hosted by facilities that invite their most interested potential residents or family members. These community seminars are often attended by people in crisis ready to make decisions. The following topics have been successful:

■ **Stress & Stress Management.** This program provides a conceptual understanding of stress and its causes (and solutions).

■ **The Family Caregiver: Finding a Balance.** Emphasis is on the importance of caregiver empowerment as a means to address and ameliorate physical and emotional burnout.

■ **It's Hard to Be My Mother's Mother** — an Exploration of the Mother/Adult Daughter Relationship. This seminar will address the types of "dutiful daughters," making promises we can't always keep, setting boundaries with love, providing care without being a martyr.

■ **If Mom & Dad Live To Be 100, Where Should They Live?** Many of us face the daunting task of figuring out which facility is the best, where in the continuum of care your parents needs can be best addressed, costs, and strengths and weaknesses of different programs. Options discussed include: staying at home, assisted living, independent living, CCRCs, skilled nursing facilities, and payment for each.

■ **Eldercare Planning: How to Avoid a Crisis.** Early planning is critical to making major life decisions in a calm and efficient manner. Attendees will be walked through the process of eldercare planning as it relates to medical, legal, financial and residential options.

■ **Understanding the Impact of Aging on Families.** This program provides attendees with a working understanding of the process of aging in this country and its impact on the family.

will give the facility or hospital a great opportunity to show off its best qualities, such as a high-tech environment, top-notch cooking staff, well-trained clinical staff and the like. And of course, it's a perfect co-marketing opportunity, giving the facility a chance to reach people who could refer patients or residents.

Margaret Quinn, area sales manager for Sunrise Assisted Living, credits the CEU provision for bringing many community referral sources into her facility not only to see the facility but to meet the staff. Quinn finds referral sources are more comfortable referring after a face-to-face meeting and a facility tour. (They offer quick tours during the session's refreshment breaks.)

Another benefit to point out to facility-based partners: attendance of staff from other facilities. Sunrise has found that the sessions help it obtain referrals, even from competitors, for its specialty programs. For example, it offers a reminiscence program for Alzheimer's patients, and not all facilities are equipped to handle these types of demented residents. So some attendees could be from other assisted living facilities that then refer to Sunrise if they are full and there's an immediate need, or if they need the higher acuity that Sunrise provides, or access to the Alzheimer's program.

To seal the deal, be sure you've set up your CEU sessions as a turnkey operation. Freedom's classes are all approved for CEUs in advance, and the PowerPoint presentations, handouts, certificates and sign-in sheets are provided for the facility. The facility only has to send out marketing through

its own mailing list and process the registrations.

Freedom even sends out reminder emails, posts the event on the facility's Web site, and markets the seminar to its own clients, stating "Hope you'll join us at (facility's name) on (date and time); as Freedom is presenting (whatever topic)". Then the workshop is meeting one of the two-tiered promotional goals. Both Freedom and the facility win with the exposure.

And facilities will pay handsomely for this type of service — Freedom receives up to \$300 per hour. They even get requests to offer the CEUs and the seminars from home health companies, which they'll do for agencies not in their market, and which are willing to cross-refer out-of-town patients when possible. ■



**About the Author:** *Merrily Orsini is a former private duty owner and an industry expert, serving as a board member for the Private Duty Homecare Association. She is owner and managing director of **corecubed**, an integrated marketing communications agency that specializes in branding and communications services for the home care industry. Further information can be found at [www.corecubed.com](http://www.corecubed.com).*

Reprinted with permission of Success in Home Care, the national award-winning magazine with operational and clinical solutions for home health executives. For subscription information, please call toll-free 1-877-602-3835 or visit our website at: [www.homehealthinteractive.com](http://www.homehealthinteractive.com).