

# *Staffing Your Caring for People Services Franchise*

## A Word on Legal Compliance

Because each state has special employee regulations, you will need to contact your local government agencies for a complete list of requirements for your franchise. As the owner/operator, you will be responsible for hiring, training, promoting, and dismissing employees. To ensure that all aspects of this process are covered correctly and legally, pay careful attention to the details regarding state and federal employment laws. You can use the website for the department of labor or [www.dol.gov](http://www.dol.gov) as a good reference to stay current with local state regulations.

The first step is to prepare for the actual hiring process. This allows your franchise to legally hire employees who are authorized to work in the United States. There are several processes you must complete before you hire the first employee.

Key steps to complete before hiring:

- 1) File for a Federal Employer Identification Number (Federal Form # SS-4). This sets up the federal income tax process for withholding. You will also be required to set up a payroll deduction account. More information about this process is available at [www.irs.gov](http://www.irs.gov).
- 2) Determine what federal forms you will need (includes the W4, I-9). You will need to establish any similar forms on the state level.

## Regulatory Updates

The following should be checked upon and reviewed quarterly to stay up to date with the latest federal and local regulations.

- HIPAA
- Interview questions
- Federal and local regulations
- HR basics

**Note:** Join HR organizations there are great networks you can use as vital resources such as SHRM.

## Key steps to begin your hiring process:

- 1) Determine initial staffing needs. This may be difficult because most of your immediate needs will be based on initial demand for your product/service. Refer to your business plan forecast for accurate planning. Determine the minimum you will need to run the office, perform the services, and manage short staffing needs due to illness, vacations, etc.
- 2) Find key staff members first. This includes any management or supervisory roles. It's also a good idea to have someone who can float across different parts of the business to manage areas where you may be short-handed.

Determining wages or salaries is a key to hiring and retaining valuable employees. As manager of a franchise, you will quickly find that keeping turnover low and maintaining a high level of employee morale is vital to your success. You will need to take a close survey of what other employers are paying individuals with similar skill sets or education levels. Establish competitive salary guidelines before advertising any position, and relate those figures to what you have allocated for your payroll budget.

## Staffing Your Caring for People Services Franchise

To maintain the high quality associated with Caring for People Services, the following staffing standards are mandated.

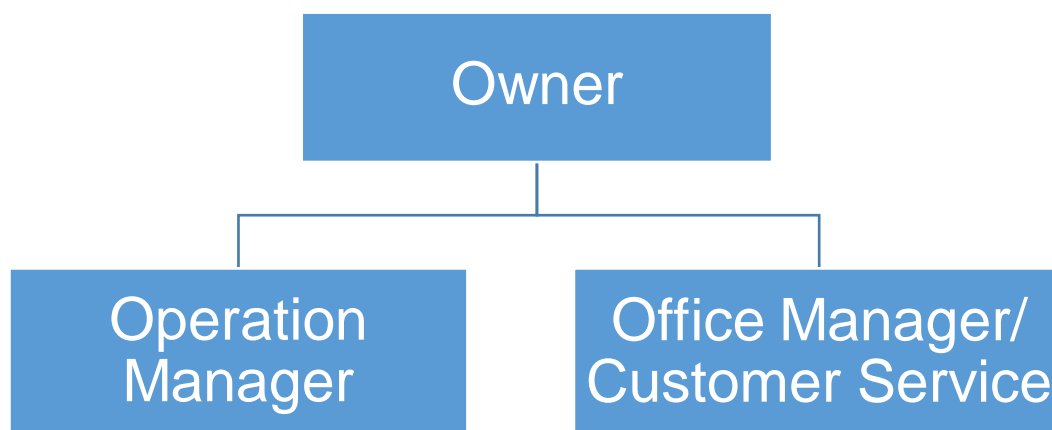
There are two full time positions within each Caring for People Services franchise that are required once the doors are open for business. The first is the General Business Manager and the second is the Operation Manager. The need for additional employees will ultimately be a direct function of the demand for your services.

We also strongly recommend that all franchise locations initially employ an office manager who takes calls, schedules appointments, manages the books, etc.

There is a third position you should consider after your franchise has grown. That position is the Executive Director for owners who have started out as the General Business Manager or CST Management position then moved them into a more general position overseeing the entire business. This is accomplished by replacing yourself with a new General Business Manager or CST while maintaining the two original full time positions. The Executive Director Position still must dedicate his or her full time and attention to the business.

Your staff will ultimately consist of Managers handling Business, Customer Service Reps, and Service workers. In addition to these positions, you must hire Support Workers. Please refer to the information below for skill sets, profiles, and job descriptions for each position.

The combination or formula below serves as a guideline only. Upon opening your Caring for People Services franchise for business, you are responsible for managing payroll efficiently to meet your financial goals. Here is how a newly-created Caring for People Services franchise is staffed:



In the initial phase of business, the owner is also an active operator, and may even engage in activities that the Operations Manager and Office Manager handles. Here the Office Manager is responsible for all customer transaction activities, from scheduling jobs to processing payments.

## Recruitment Process

### Ad developing

CFPS will provide you with suggested guidelines for developing ads. Please note that special considerations should be taken when developing an ad. Based on the specific characteristics of the required pool of candidates, these would include demographics, location, qualifications and posting outlet. The job qualifications must remain the same.

### Ad Placing

Identify outlets to advertise job openings. Choose the right one that matches the characteristics of the employees who you are looking for.

- a. Company Website
- b. Social Media
  - Facebook
  - LinkedIn
  - Twitter
- c. Job Board (for ad placing and an option for resume search)
  - [www.indeed.com](http://www.indeed.com)
  - [www.monster.com](http://www.monster.com)
  - [www.careerbuilder.com](http://www.careerbuilder.com)
- d. Workforce development
- e. Education Centers
  - Community College
  - Colleges/Universities
- f. Career fairs
- g. Referrals/Personal connections
  - Develop a network of potential reference sources such as college professors, academic deans, associations, and other related professionals.

### Application Process

Identify the point of access for application placement.

### Candidate Selection (*Initial screening*)

As mentioned before, applicants must have a single standardized point of access to apply for any job position. This will help the initial selection and subsequent information inquiries as well as protecting the organization from any discriminatory practices. The filters should be identified through the job descriptions and the specific needs of the organization.

### Phone interview

#### Process

The phone interview process is a very important part of recruiting and candidate selection. It gives both the interviewer and the candidate a chance to personally interact and get an idea of personality, qualifications, confidence level and motivation.

1. Once the job candidate is identified, there will be an initial contact to set up an initial interview which will be held over the phone.
2. The interviewer will call the candidate at his/her preferred phone number and make sure the time is still acceptable. Giving a general overview of the position is helpful at this point.

3. Begin with the interview questions and be sure to allow the candidate enough time to respond. Answer any questions the person has.
4. A standard set of questions must be pre-developed and interviewees must adhere to these questions; however, making note of any additional information shared. Interviewer is expected to be familiar with the information gathered through the job application.
5. Document as much of the conversation as possible for review.
6. At the end of the conversation, ask if the candidate has any further questions or comments.
7. Determine if the person is qualified for the position and if comfortable, schedule a 2<sup>nd</sup> interview in-person with a Hiring Manager after ensuring that the manager is available.
8. Thank the candidate for his/her time and let them know you will send them information through email to confirm the meeting.
9. Send an email with details to the candidate to confirm date, time and location.
10. Communicate with anyone who needs to be notified about this interview.
11. Document the interview in your applicant tracking system.
12. If decision is made to proceed with the candidate, schedule a face to face interview with the hiring manager. If not, file the application and send a rejection letter when qualified candidate is chosen.

**NOTE:** Interviewer must be current with all the laws and regulations of standard interviews

### Forms

- Phone Interview Questionnaire

### Face to Face interview

Candidates, who are pre-selected through the phone interview, will be scheduled for a face to face interview with a representative of HR and/or the Hiring Manager.

A standard set of questions must be pre-developed and interviewees must adhere to these questions. Follow up on responses can be done within the regulatory legal frame.

### Process

When the candidate arrives, please make him/her feel welcome and let the interviewer know they have arrived. In the meantime, if there is an opportunity to introduce the candidate to some of the staff would be a good idea to make them feel welcome. Remember that when a candidate is meeting with you, it is a two-way street interview, the candidate is also assessing if the organization is a right fit.

1. Review initial information
  - Resume
  - Job application
2. Review phone interview
  - Identify if there should be more detail in the answers given. Interviewer must not make up information, but adhere to what the employee shared; the right language could be "On your phone interview when asked \_\_\_\_ you said something like \_\_\_\_ could you expand a bit more on that?"
3. Go through the pre-determined questions
  - Elicit more information if needed just based on the answers

4. Answer any questions that the employee may have, within the scope of the information that should be made available at this stage of the recruitment process.
5. Decide if offer should be made to the candidate after discussion with hiring manager and other appropriate staff.

#### *Forms*

- Face to Face Interview Questionnaire

### Pre-Employment

- Create a contingent job offer and deliver verbally.
- If accepted, send a copy of the written job offer to candidate to sign
- Schedule a time when the candidate can come in and complete the following paperwork:
  - DHHS Adult/Child Abuse and Neglect Registry consent form
  - Background check consent form
  - Drug screen location and instructions; to be completed within 48 hours
  - References (3 professional preferred)
  - Any other document needed based on local laws and regulations.

#### *Documents*

- Offer letter with contingencies and copy of List of Acceptable Documents for I-9 completion

After the candidate completes the forms, submit the DHHS and background documents and begin reference checks.

*Forms (Some of these forms might not apply to your own location and other forms might be needed. Check local regulations)*

### Onboarding

After both interviews (phone and face to face) and clearance of the appropriate checks, the Human Resources Department will set up a time for an onboarding process. If the person does not clear the pre-hire requirements, file the documents, and send a rejection letter.

If all requirements are cleared, the assigned supervisor will help the new employee navigate the process as he or she visits with the right person. When scheduling the Orientation, advise the candidate to bring ID for the I-9, voided check for Direct Deposit and copy of current auto insurance.

### Human Resources New Hire Orientation

On the scheduled day of Orientation, HR will meet with the candidate to complete the W-4, I-9 and other required legal forms, go over general policies and obtain policy signoffs and personal information from the employee. The employee will also have his/her picture taken for an ID badge.

*Forms (Some of these forms might not apply to your own location and other forms might be needed. Check local regulations)*

- Personal Information form
- W-4 (form is found on [www.irs.gov](http://www.irs.gov))
- I-9 (ensures appropriate ID is presented; the form is found on [www.dhs.gov](http://www.dhs.gov))
- Employment Agreement
- Authorization for Direct Deposit
- Photo Release Form (for internal and external advertising use)

- Conditions for Termination
- Employee Evaluation Criteria
- Employee Benefits and Bonus Programs

Following the HR part of the process, the employee will meet with the Hiring Manager to complete his/her orientation with the company including scheduled days and times to work.

## New Hire Orientation

*Hiring Manager begins the new hire's orientation with the following process.*

### Orientation and review of employee handbook:

1. Overview of company
2. Goals, values, and beliefs
3. Attendance
4. Confidentiality
5. Dress code
6. Sexual harassment
7. Holidays
8. Vacation/Sick leave
9. Employee benefits, health and bonus program
10. Introductions to any current staff who are in the office

## Operations

It is important for employees to have a good grasp of expectations about the organization and setting up the foundations of a new working relationship.

*(If there is a dedicated scheduler, the employee will meet with him/her to determine an assignment including date, time, and location.)*

1. When and how the new employee will be matched up with potential clients and added to the work schedule
2. Basics on WhenToWork Software
3. Schedule
4. Review and understanding of how timesheets are to be filled
5. Timesheets due date and how they are to be turned in (may vary depending location)

## Supervision

In this section the supervisor will be setting expectations to set the tone. A culture of communication and reciprocal feedback should be encouraged and promoted.

1. Employee expectations
2. What employees 'can and can't do' when working in the homes with clients
3. Reporting in aspects, whom to call, when and why
4. Staff development & job coaching
5. Observations, performance reviews, annual evaluations
6. Feedback
  - Purpose and implementation

## Basic Pre-Service

Pre-service will take place prior to any caregiver field assignment. Pre-service will be a 30-minute-long essential training which will allow the new employee to perform the basic functions of the job at hand. This training is required to any caregiver to increase the quality of services provided, promoting safety and wellbeing of the clients and the caregivers.

## Topics to be reviewed

1. HIPAA (5 minutes)
2. Infection Prevention & Standard Precautions (5 minutes w/ handouts to take home)
  - Handwashing and use of Personal Protective Equipment (PPE)
3. Safety and Body Mechanics (7 minutes w/ handouts to take home)
  - Lifting, alignment, center of gravity
  - Reducing risk of automobile accidents
  - Guidelines for using your car on the job
4. Personal Care skills (7 minutes w/ handouts to take home)
  - Bathing
  - Grooming
  - Oral Care
  - Prosthetic Devices
  - Toileting
5. Communication and Documentation (6 minutes)
  - Documenting visits
  - Case notes
  - Incident report

## Job Immersion (15-day plan)

New employees will have a process to get immersed to the job assigned

## Shadowing

New employee will be observed at least two times by a staff member previously designated by the direct supervisor. Most of the times, the observer is the designated supervisor. Following the observation, it should be signed off that the new employee can work on their own.

## Ongoing training

Employees will have ongoing training in accordance with the curriculum pre-established by the Human Resources training department. Caregivers will be required to attend two hours of paid training in a calendar year. If an employee is hired in the second half of the calendar year, the employee will only be required one hour of training for that calendar year.

## Description of Positions with Profiles

### General Manager Job Description

- Scheduling of entire staff, including technicians, office manager, sales staff, and manager (if applicable), plus key employees. The General Manager must oversee and make proper changes.
- Must be able to perform any of the functions of the franchise

- Must do all the paperwork, including the End of the Month paperwork. Also, train assistants how to correctly complete the daily paperwork.
- Oversee the inventory going in and out of supplies and equipment
- Promotions/Advertising – Must do daily tracking of all promotional activity. This responsibility may be delegated to or shared with the Assistant Manager.
- Tracking of the following: sales, customer counts, comps, giveaways, gift certificates, waste, overtime, and costs of products, repairs, and maintenance, among other things.
- Employment problem solver, including hiring good people and firing bad ones

## Caring for People Services Management Characteristics

### Planning and Visioning

- Forward planning: This trait enables the staff and franchise to cope with frequent change.
- Being “on top of the details” and meticulous: This trait provides comfort for both franchise owners (who want to be assured the service is in safe hands) and front-line staff (who wants to know that their manager understands the implications of change and is able to provide advice and support).
- Able to organize the job set effectively rather than being obsessed by formal structures.

### Organizing and Connecting

- Effective in securing adequate resources for doing the day-to-day work – evidenced in business planning, IT, and staff training. Also, good at getting additional resources to field support.

### Staffing and Supporting

- Good at promoting team working and in communicating: these traits are often manifested in the personal style of the manager being “approachable” and “listening.”
- Securing the right level of staff resources; protecting and developing those resources.

### Controlling and Challenging/Celebrating

- Caring for People Services managers are comfortable, even relish, working in a performance- and target-driven environment: they tend to view performance indicators as relevant and meaningful to the service they are expected to deliver.

### Leadership Characteristics

- While not visionary, Caring for People Services managers can see the “big picture” with their feet firmly on the ground and focused on operational realities.
- They are champions of constructive change and enthusiastic about performance improvement.
- They foster good relations with franchise owners – often as a means of ensuring their service gets the resources it needs.
- They support their teams energetically – especially through training and planning to prepare for change.