

Monthly Satisfaction Meeting Agenda

Date: _____

Facilitator Preparation Notes

- Latest Home Care Pulse Satisfaction Reports (Meeting should occur soon after receiving the latest reports)
- Highlight the following areas in the reports (Highlight on printed copy or save trees and use computer software such as Adobe Acrobat)
 - Exceptional (Be selective) Positive Feedback – Green
 - Negative (Be selective) Feedback – Pink
 - Caregivers Praised in the Feedback – Yellow
 - Caregivers mentioned in a negative way - Blue
 - Satisfaction areas that are trending upward - Green
 - Satisfaction areas that are trending downward – Pink
- Caregiver Praise List – Write down all the names of the caregivers who were praised in the feedback and review with team
- Caregiver Needs Improvement List – Write down all the names of caregivers who are struggling, based on the feedback and review with team
- Client Need List – Identify those clients who are in need of specific attention and write them down for the team to review

Satisfaction Meeting Agenda

1. Review minutes from last month
2. Previous Goals - Review last months' goals. Were they achieved? If not, what obstacles kept the team from achieving them? Do we need to continue working on them?
3. Previous Actions - What satisfaction action items are still outstanding? Write them in the action table below with updated deadlines.
4. Handout/display Reports - Display Home Care Pulse Satisfaction Reports or Handout to Team
5. Feedback Review - Review all feedback, focusing on the highlighted areas, starting with the positive
6. Caregiver Praise List – How is the team going to recognize their efforts? Make assignments
7. Caregiver Improvement List – What training/discipline does each of them need? Make assignments



8. Client Need List – Review the list and make assignments to team members who can reach out and improve the situation
9. Report Review - Review each individual report (Benchmarking, Trends, and Percentile Rankings) and discuss the positive and negative trends, etc.
10. Goals - Set 3-5 positive satisfaction goals for the next 30-days. They can be related to specific clients/caregivers or general goals focused on improving satisfaction.
11. Actions – Add any additional actions to the table below. Actions should tie in to the 30-day Goals.

Goals

30-Day Satisfaction Goals	Deadline
Have 2 trainings on properly transferring a client	April 15 th

Actions

Action Item	Assigned To	Deadline
Call ABC HH and schedule a transfer training	Susan	April 1st