

**Organizational Performance Analysis and Improvement Plan for  
Angels of Care Pediatric Home Health**

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# Introduction

## About Angels of Care

Angels of Care is a nurse owned and operated pediatric home health organization that provides in home nurses and therapists to families of children that are medically fragile. Since their inception in 2000, they have been a mainstay in the home health industry for Texas. Since that time, they have partnered with an investment firm and have expanded both their services and geographical footprint so patients nationwide can have the option of partnering with a health care option that demonstrates love and compassion. Services currently provided includes private duty nursing, skilled visits, occupational therapy, physical therapy, speech therapy, and attendant or respite care. In addition, they support patients throughout the states of Texas, Arizona, Colorado, Florida, Pennsylvania, North Carolina, and South Carolina.

## Mission and Vision

Angels of Care's Mission is to "provide children and young adults in need with high-quality home healthcare and healthcare services in a loving, caring, and professional manner." Angels of Care's vision is to "be considered the very best pediatric home health agency with the best care and service offered throughout the country." To achieve this goal, Angels of Care is incorporating technology solutions to streamline processes, enhancing communication, and making client support easier. They are committed to making a positive impact in the lives of their patients, employees, and the pediatric special needs community.

## HALOS Core Values

Emphasizing their "HALOS" based core values, Angels of Care employees and the organization focus on demonstrating Heart, Advocacy, Love, Outreach, and Speed. Heart

represents the clients, who are at the heart of all decisions and actions, keeping patient care the top priority. They Advocate for medically fragile children and their needs in the community, schools, legislative meetings, and with the managed care organizations, improving the support for children with disabilities and special needs. Employees are shown Love by the company, as well as to each other, appreciating team members as unique individuals with families and needs outside of the company. Angels of Care also encourages Outreach into the special needs community, promoting involvement with the charities and partnerships that embody the needs of our patients. And lastly, they act with Speed, ensuring families and clients are taken care of quickly and efficiently. The HALOS values are embedded in every decision and action of Angels of Care, truly representing their core beliefs and drivers.

### **Industry Challenges**

In order to support home health needs for patients, it is critical for Angels of Care to be able to recruit nurses to provide these services. However, over the last two decades, much of the United States has been facing a nursing shortage. In fact, as of 2016, Texas ranked second in the country after California in their unmet nurse requirements (Townsend, 2021). Moreover, with the onset of COVID-19 that began in 2020, nurse needs increased and the shortage in nurses is exacerbated, causing many hospitals to offer triple or even quadruple in wages in order to recruit sufficient nurses to cover shifts.

Simultaneously, healthcare organizations have been implementing measures to decrease expenditures, resulting in reduced reimbursement for necessary services. In 2005, the Deficit Reduction Act (DRA) was passed with the intent of Medicaid and Medicare to decrease fraud and abuse with illegitimate charges (Cabral et al., 2010). Both programs took the path of increasing documentation requirements to substantiate claims prior to disbursement of funds,

oftentimes rejecting or denying claims on technicalities even if the services were rendered and necessary (Cabral et al., 2010). In addition, Medicaid and Medicare healthcare organizations have actively decreased their reimbursement allowable rates by as much as 70% for some items since DRA was established (CMS, 2006). For instance, a stationary oxygen concentrator paid \$198.40 per month via Medicare in the Dallas, Texas area in 2007; in 2021, the same item reimburses at only \$73.38, reflecting a 63.01% reduction in financial return (CMS, 2006). This decrease in funding coupled with medical facilities offering escalated rates during the COVID-19 pandemic has crippled the ability for many home health organizations to recruit and retain healthcare providers, which equates to thousands of patients not receiving the critical in-home care they require.

### **Organizational Gaps and Challenges**

With the many serious ongoing issues occurring in the healthcare industry, it is important that Angels of Care runs efficiently and effectively. Ensuring team members have the tools they need to be successful in their roles has become a critical need at Angels of Care. Unfortunately, as a family-owned business that experienced exponential growth in a short timeframe, the company never took the time to document their processes, nor do they have a process of approval, or centralized location to house policy. This lack of accessibility to find resources outlining job procedures has decreased training efficiency, leading to inadequately trained employees, in addition to a high rate of errors and inadvertent mistakes with tenured staff who believe they understand the required tasks but miss key steps.

In addition to lack of documented policies and thoroughly developed instructional design content, newly acquired facilities are disconnected to the home office and core company beliefs. Training is currently not consistent across all locations and communication via email is resulting

in delayed responses and no response. Corporate office is currently conducting about multiple site visits per month to ensure training and processes are being followed. Since the obtained businesses retained most of the staff from prior to acquisition, they each have pre-existing cultures and practices. While attempts have been made to include them into the Angels of Care cultural and practicing systems, lack of connection and communication has led many to revert to their prior practices. Without a local presence, Angels of Care has failed to create an online community, nor have they intermingled the remote branches, facilitating a network of resources and togetherness.

### **Special Projects Team**

Angels of Care Special Projects team supports the organization by focusing on areas of the business with cross departmental project management needs. Our vision is to offer performance improvement solutions that are carried out with careful data analysis and innovative solutions to positively impact quality of work, team productivity, technology functionality, and organizational communication and business process, which ultimately leads to better patient outcomes. To accomplish our vision, the Angels of Care Special Projects team priorities include:

- Collaborating with business leaders and staff to understand process gaps and needs
- Developing technical solutions to improve workplace efficiencies
- Providing growth opportunities for staff via accessible and current documentation
- Streamlining communication channels while standardizing processes and establishing interaction expectations
- Implementing and managing a document control process for identifying documentation needs, development, review, and maintenance

- Monitoring results via data analysis and metrics reporting, including task completion and accuracy as well as individual, local, regional, and national overall outcomes

### **Performance Analysis and Opportunity**

The project that we are working on has crossover of performance analysis, with the need including developing training, incorporating SharePoint as a modern technology rollout, developing a document control process, and developing people via online training and resources. However, for the scope of this project, we will be focusing on the technology rollout aspect of SharePoint. The document control process, people development, and full instructional design documentation is out of scope.

We will focus on developing a SharePoint intranet platform to allow for interconnectivity as an online community, and future solutions for mainstreaming training material. The primary performance analysis opportunity for Angels of Care and focus of this project is the technology rollout of SharePoint as an intranet community, designing it to enhance and support process documentation, employee training, and organization-wide communication. In addition, we will concentrate on developing content that will drive users to utilize the innovative technology, decreasing emails, allow for streamlining training, and improve efficiencies in onboarding new acquisitions.

The objective of this performance analysis opportunity would be to implement SharePoint across the organization with sufficient content developed to encourage users to utilize the technology for streamlined communication, corporate integration, employee training and content resource accessibility, and acquisition onboarding. Further, this technology rollout will reduce the number of visits, ultimately saving the organization expensive travel expenses.

## Process

Once the idea to assess Angels of Care program with the opportunity to rollout a technology software the group began the initial project by gathering data and performance analysis by way of interviews and surveys. The information gathered would provide enough detail to use the appropriate performance interventions that would give the technology rollout, SharePoint, the opportunity to be successful for the organization to grow.

The tasks and assignments were spread out evenly amongst the three team members for the rollout project. All tasks were given on a volunteered basis and accomplished strategically without any hesitation or negativity. Overall, the group showed a great deal of admiration for the project and never failed to deliver a helping hand if needed. Below are the members and what tasks they performed for the success of this project.

### **Jennifer McGuire:**

Jennifer was a great team player and always asked to help other members on assignments for the Angels of Care rollout technology project. Jennifer had great knowledge and experience with SharePoint and worked alongside with both Kenna and Art to give examples of how SharePoint worked and process. She used communication networks and documentation and standards as her performance interventions to gather information for SharePoint and during her interviews with employees from Angels of Care.

Jennifer was responsible for the Evaluation and conclusion of the final report and worked on the presentation PowerPoint slide as well.

### **Arturo Lara:**

Arturo was a key player in making sure deadlines were met and that all members were able to meet via zoom at the suggested times. He helped create and edit the questions that were given to employees and stakeholders from the gathering data forms which was used in Excel spreadsheets to determine what performance interventions were to be used in the project.

Arturo's portion of the final report was to elaborate on the process and results of the performance analysis portion which would show how the SharePoint technology either was a success, failure, or working progress for the Angels of Care rollout program.

**Kenna Farrach:**

Kenna took the reins and orchestrating the design and implementation of the project since she is employed at Angels of Care. She volunteered to be the leader and liaison between the group and the organization. Kenna created the zoom call meetings via email and interviewed stakeholders within Angels of Care to provide the necessary data that was needed for surveys and questions which was needed in the gathering data portion.

Her knowledge of the organizational structure at Angels of Care and access to key documents provided the group with firsthand information and data that could not have been uncovered or retrieved otherwise.

**All Team Members:**

The group meetings were conducted via zoom on agreed times and dates on a weekly basis. During these meetings, the members decided on what tasks and assignments each person would be responsible for and if any member needed help, they could reach out via email for any suggestions. The group used SharePoint and OneDrive to store all data and analysis that could be



used for the project moving forward. In addition, the team maintained an Excel sheet that outlined responsibilities, due dates, progress, and ownership.

Weekly tasks were discussed and distributed amongst team members based on the assignment criteria and team member specialization. For the gathering data portion, the group used Microsoft Word and Excel to perform surveys and interviews to store questions, answers, and any data found within this portion. Each member reviewed the data and submitted the forms to the professor for approval. The group divided the performance interventions that could be used in the technology rollout, discussed what performance analysis was discovered from those interventions, and identified possible tools to help support the intervention. The discussions were finalized during the zoom meetings and any adjustments were relayed via email. During the final meeting, the group reviewed the compiled data that was found for the performance intervention, gathering data forms, and discussed what members will write about and what slides to add for the presentation. All data that was gathered from each member was submitted and observed by the professor for approval.

## Performance Analysis Results

Change is inevitable in any organization, and as a growing organization with major disruptions in the industry, employees at Angels of Care have been in a constant state of change for years. As such, the executive team is cautious at ensuring the changes taking place are necessary and beneficial to the organization. In fact, it is the current struggles in performance gaps due to lack of connectivity, communication, centralized access to documented practices, and challenges incurred with decreased reimbursement and the nursing shortage that drives the change and increased the urgency to develop an organization intranet to support these needs at

Angels of Care. In addition, as CEO Jessica Riggs reiterated, “Our vision is to be the best pediatric home health agency with the best care and services offered throughout the country, and we intend to keep growing rapidly. After acquiring just five new locations, it has become clear we do not yet have enough infrastructure in place to support the team or ensure they feel connected; we can do better. Having an online community with any and all information needed is where we need to start,” (*SharePoint Rollout Survey 2021*).

While the drivers for the change are clearly identifiable and undeniable by most staff interviewed at Angels of Care, managing change effectively with the staff to ensure adoption and usage will be a crucial barrier to overcome. Additional barriers to success in the SharePoint rollout include skill development and expertise, financial constraints, time constraints, and ongoing maintenance. Therefore, it is Angels of Care duty to provide performance analysis to ensure the success of SharePoint.

### **Change Readiness**

With the change acknowledged as necessary and critical to organization success, the question then becomes, are the employees and supervisors equipped and ready and understand, accept, and adopt the changes? Historically at Angels of Care, employees have experienced pain in new software rollouts, with little understanding of how it works and minimal support or resources available to gain the knowledge on proper usage. Coupled with the frequent changes that are sometimes short-lived with lack of follow through, change resistance and fatigue are valid concerns.

The questions and surveys that were conducted during the gathering data portion displayed appreciation and understanding for the SharePoint rollout. Data that was gathered and

analyzed through surveys and questionnaires showed that some employees do not understand how to use computer software programs or do not know how to access them and are afraid to ask for help. Furthermore, many employees expressed uncertainty and doubt regarding the timing of training and how to implement it at the team level. With team members spread across the country, it can be challenging to coordinate training or reinforce usage.

### **Technical Skill and Expertise Development**

In implementing a new software application such as SharePoint, organizations may find they do not yet have expertise within their staff necessary for development and production. Based on surveys from the committee members, only one person has prior experience as a SharePoint administrator, two have limited experience, and the fourth has no experience (*SharePoint Rollout Survey 2021*). Limited experience for committee members can pose the added risk of unwittingly developing content with necessary protocol established, which can lead to massive cleanup measures later in the project. For instance, if the team began building content with community pages rather than team pages, any pages built would need to be recreated if one outcome was to link the page to a Microsoft Teams chat. Therefore, this lack of experience in SharePoint can lead to an increase in time requirements, delaying the ultimate rollout, or rolling out a product with less functionality than anticipated.

### **Financial and Time Constraints**

When an organization decides to rollout a technology program such as SharePoint, the first thing that often comes to mind for the stakeholder is, “How much is it going to cost, and how long will it take to complete and get the employees up to speed?” Since SharePoint is an included product in the Microsoft suite, there are no additional costs for the core program for the

organization. However, there are additional add-in tools that Angels of Care may determine would be beneficial to utilize that could cost additional monthly funds. Aside from the cost of add-ins, the primary expense for the SharePoint rollout is attributed to the time spent by the staff, in addition to any courses or certifications needed to develop expertise.

In asking the stakeholders for Angels of Care about the possible cost of implementing SharePoint, Justin Hilliger, VP of Therapy and Implementations, stated, “If we can reduce the number of physical visits and add more zoom or virtual team meetings it would likely cut down on 5 to 10 trips we are taking right now to visit in person that could probably be eliminated, therefore cutting down cost to a significant amount on a monthly basis. The time spent to get this going would provide ROI within the first month or so, I imagine.” (*SharePoint Rollout Survey* 2021). In short, while a SharePoint implementation may use time and financial resources, the investment is acknowledged as a value added that exceeds cost for the organization.

### **Ongoing Maintenance**

Overwhelmingly, the number one concern of committee members, staff, and senior leadership regarding the SharePoint rollout was ongoing maintenance and ownership. With no current knowledge experts, nor without a centralized training or documentation team, Angels of Care does not currently have an employee who is ultimately responsible for communicated content or documentation. Furthermore, the individual or department who would have oversight has not yet been determined; the ideal individual would need to have input and knowledge of human resources, information technology, training and development, operational practices, organizational relations, and compliance. The current organizational structure does not have existing departments for each of these categories, and the departments that are established

typically contain a handful of individuals with isolated skills rather than broad operational understanding.

In an ever-changing organization, the maintenance of SharePoint could easily require the full-time attention of a dedicated team member. Further, since SharePoint is being developed to fill the existing gap of lack of communication, it is acknowledged by the executive team that this practice is not currently in place, indicating the need for a new position and employee. Luckily, despite the issues concerning budget cuts from reductions in billable hours and service reimbursement, CEO Jessica Riggs agrees that adding a new full-time position would be worth the added cost, proclaiming that she is “on board with hiring someone for oversight and document control maintenance. It’s cheaper than the mistakes we make,” (*SharePoint Rollout Survey 2021*).

## Proposed Solutions

Developing SharePoint as a source of communication and content to help bring remote team members together, providing a source for information and connection, is an accepted outcome of the rollout. However, details on how to improve communication and what content to include to promote the needs of the organization have yet to be outlined. With such a broad list of needs for initial rollout, it is important to consider the ultimate objective of developing a growable platform that contains enough content to encourage usage and communication, standardize corporate identity, support employee training and content resource accessibility, and streamline acquisition onboarding. To complete these requirements, the proposed solutions include ensuring team members possess the required skills, establish communication network and virtual teams, and implement knowledge management and documentation standardization.

This will be accomplished via the use of various tools and change management initiatives to promote optimal adoption and functionality.

### **Technical Skill and Expertise Development**

Skills and expertise development are barriers that will be faced as the rollout begins, but with thorough self-directed learning via research, team collaboration, coaching and mentoring, and on-the-job training interventions, committee members have the opportunity to gain the necessary skills to be successful with the SharePoint implementation. In addition, CEO Jessica Riggs is committed to investing in any necessary certifications or seminars needed to bolster implementation team expertise (*SharePoint Rollout Survey 2021*). Ultimately, this investment in team member growth, allowing them to learn as they go, will positively impact the employee perception of Angels of Care supporting personal growth and development interventions of the committee members.

### **Communication Network**

Effective communication is vital to an organization's success, especially an organization like Angels of Care that has multiple locations across the country. Communication within an organization is more than simply sending and receiving messages. Organizational communication also includes the content of the message and the means of sending the message. Analyzing the organization's communication is the first step to implementation. It must be reviewed to learn the various ways the organization is communicating, the means through which the communication is shared, and the management style within the organization. Analysis should reveal if the problem is in the system of communication. Does it flow correctly? Does communication happen at an acceptable rate? Are communication tools readily available? Does

the communication produce helpful information? Are messages following a common theme that helps promote employee performance (Van Tiem et al., 2012 p. 363-64)? Establishing a clear communication network will ensure all branches of the organization can communicate with any organization member, no matter their location. Access to communication tools that are easy to use readily available support collaboration and sharing knowledge. Collaboration opens knowledge management information sharing to a wider variety of members within the organization, allowing innovation and new concepts to happen more frequently (Rosenberg, 2006, p.157).

A tool that fosters immediate communication and an environment for collaboration is Zoom. This video conferencing tool will allow members from different locations to meet synchronously without the expense of travel or long-distance phone calls. Communication is instantaneous with the bonus of being able to see each other. Breakout rooms will allow larger meetings to split into smaller groups for more effective brainstorming. This tool is free, but the user is limited to 45-minute sessions, which will keep meetings from going on longer than necessary, supporting concise communication.

### **Virtual Team Development**

As stated by Moseley and Dessinger, "Organizational learning is a conscious and deliberate way to design organizations so that they function effectively, efficiently, and provide value to their customers or clients through the goods and services that they offer," (Van Tiem et al., 2012 p. 245). An organizational development intervention that can assist with the performance analysis is virtual teams. A virtual team is a group of employees or workers who use email, instant messaging, or virtual meetings that are geographically apart from one another by collaborating and discussing information and data through these technology services. Because

so many employees are working throughout different parts of the country, Technology, such as virtual teams, is vital to help complete a rollout like SharePoint to be a success. Employees can hold zoom conferences, email, or text one another for information, gathering data, or answer a simple question they may have. As stated by Rosenberg, "Technology does more than support a more comprehensive set of learning and performance tools. It also has altered the nature of work. It enables more virtual work arrangements and the ability to organize globally. Teams of employees can contribute to projects from different parts of the country or the world. Partner and supplier networks can function faster and more efficiently," (Rosenberg, 2006, p. 50).

A performance tool that can be used for the SharePoint rollout system is "WhatsApp." This app is accessible and downloaded via iPhone or android is used to text and face time from anywhere in the world. The app allows employees to text and message one another for questions and concerns on the rollout documentation and learning forum. Supervisors and managers can contact employees to express concerns or even check in on how their experience with the new software is going. Bottom line, reaching out and communicating with every person in the organization via WhatsApp can be a positive outcome. It shows the employees that leaders are adapting to the change and culture of the world and using new trends to send a message that they want this intervention to be a gap closer in the PA project.

### **Knowledge Management**

As Angels of Care has grown and expanded in geography, services offered, and patient count, it has not yet developed a centralized knowledge management system. Rosenberg reiterates the importance of an accurate diagnosis of the current state, identifying the positives and negatives before designing and developing a thought-out knowledge management architecture (Rosenberg, 2006, p. 141-143). Historically, Angels of Care has promoted the most



knowledgeable employees regarding processes, emphasizing the importance of the individuals with the information. This promotion of employees has unintentionally caused staff members in leadership roles, or those desiring leadership roles, to be somewhat secretive and possessive of their knowledge; in other words, while knowledge is valued, those with it treat it as a form of power. Therefore, many processes have not been documented or shared. As Angels of Care grows, the need for sharing knowledge increases.

The knowledge management PT intervention's primary purpose is to provide easy access to the information needed (Rosenberg, 2005, p. 129). As Moseley and Dessinger point out, "If the knowledge management does not provide users with timely, accurate information, inform them of best practices, and link them to expertise, organizations will not realize the full value of their investment in the system," (Van Tiem et al., 2012 p. 244). Implementing an official knowledge management system is supported by the executive leadership team; understanding this will require change management as we overcome historical bad habits.

Similarity, by housing knowledge management in SharePoint, users can utilize self-directed learning approach to access information they need when they need it. It will give the employees the knowledge to continue to learn at a self-paced option via on-the-job and online training, in addition to a resource they can quickly search for specific information regarding a topic in question. In other words, rather than relying on word of mouth by peers, guessing when they are uncertain, or seeking assistance by business leaders when questions arise, team members can utilize a search function to recall any information needed based on key words, making accurate information available at the touch of their hand.

While the knowledge management process will house documents in SharePoint, Google Glide is a tool that can provide quick learning courses for staff. It works by uploading an Excel,

such as the document library, which then auto-sorts based on categories. In this situation, the documents can be sorted by department or topic, creating a one-button approach to accessing information instantaneously. In addition, it can sort based on approval date, providing reminders to the document owner 11 months later to ensure the document is reviewed annually. Since this can be used as a website, an app on phones, and tablets, it brings an extra layer of accessibility to the desired knowledge regardless of the user platform.

### **Documentation Standardization**

Angels of Care currently has no centralized location or format for documentation and policies that all branches can access. The PT intervention of performance support documentation, and standards could help address this issue, as performance support interventions are a way to improve processes and guide deliverables. Similarly, documentation organizes information resulting in a record of the information, and it is accessible by the members of the organization for use. This documentation library can include policies, procedures, and training guidelines necessary for team success. Furthermore, organizations with precise documentation and standards can avoid legal situations and ethical dilemmas (Van Tiem et al., 2012 p. 281-87). This intervention will allow all organization branches to operate under the same standards and use the same procedures, and by housing it online, provide team members with easy access to desired information.

The knowledge repository for this documentation happens in three steps. First, the knowledge is captured. This step has been done through documentation of processes and procedures. Next, the knowledge is organized and stored; and finally, the knowledge is accessed. SharePoint will be how this documentation is organized, stored, and accessed by employees. A tool that could help this process would be Google Docs. This free word processing tool can be

used to create documentation. It allows for real-time editing between team members located at various locations across the country. Version history is available in this program to allow the team to recover older versions of the document if it proves that edits to the procedures were unsuccessful. Other tools can be used to perform the same functions. However, the benefit of Google Docs over other programs is that there is no cost associated with using the tool, which will help budget not be a factor in implementing this PT intervention.

### **Change Management**

The reason for the implementation of an intranet for Angels of Care is to standardize training and processes across the institution to ensure consistent customer care across the organization. Since staff members have expressed and demonstrated change resistance and fatigue, it is important that the SharePoint rollout is ready and prepared to manage the change in a way that minimizes staff concerns. Fortunately, stakeholders can implement communication and knowledge management interventions early on to reduce resistance and negate staff worries. As stated by Rosenberg, “There is no question that learning technology is getting better and that it can support successful, sustainable learning. But the perfect use of technology to deliver bad or unnecessary training, or training that’s offered to the wrong people at the wrong time, is worthless for the most part”. (Rosenberg, p.11, 2006).

In addition, early adoption and integration of regional team leaders and influencers will help ingrain usage in their respective areas. As Justin Hilliger, VP of Therapy and Integrations summarized, “There will be some resisters, but we need to make sure they stay on board. It's critical we all use this and not revert to bad habits,” (*SharePoint Rollout Survey* 2021). Delegated employees from all locations must be part of the change management program. They should have a full understanding of the reasoning behind the change and the role they will play during

the change. Communication via in-person and virtual meetings, phone calls, and emails will be critical to accomplishing this change management plan. These methods of communication being established now will continue to be used after the change has been implemented. By keeping staff members involved early in planning the changes, you gain not only the benefit of their suggestions, but also create natural advocates for the change you are implementing. Including potential resisters will therefore help keep them aligned with the changes, build excitement, and reposition resisters to supporters as they transition from apprehension to acceptance then excitement.

### **Future Considerations**

The establishment of an intranet using SharePoint is a starting point for centralizing process documentation, employee onboarding, and communication. As the employees become comfortable utilizing SharePoint and communication tools, the need for site visits should decrease resulting in allocated less money to travel. Collaboration among locations that are separated by large distances can increase resulting in improvements to processes and client care. SharePoint could be used to deploy future professional development opportunities and training for all employees, not just new hires, allowing consistent on-going training for all employees across the organization.

Additionally, Angels of Care should consider supplementary add-ins and functionality enabled via the implementation of SharePoint. As an example, one team member who was interviewed stated their frustration with current Gross Profit Margin calculator, which is created as an Excel sheet. The calculator requires a variety of inputs by the user, such as health insurance, billable hours, and nurse pay rate, and then provides the user the related margin associated with that patient. However, as an Excel sheet, users inadvertently save over the tool,

causing it to glitch and require someone to correct the formulas on a weekly basis. In SharePoint, there are add-in tools such as Grid, which would allow Angels of Care to create an embedded tool, eliminating the possibility for disturbing formulas. As expertise is built within the organization on the capabilities within SharePoint, Angels of Care should continue to investigate opportunities to streamline efficiencies and processes for team members.

## Evaluation Plan

Implementing SharePoint as a communication tool and knowledge management system for Angels of Care includes numerous benefits, including consistent processes throughout the organization such as training, documentation, and client support. The cost of implementation and maintaining the contract with Microsoft will be nominal compared to the travel expenses the organization is currently incurring monthly to visit the various locations across the country. Data needs to be compiled regarding travel expenses over the past year and compare that cost to implementation and paying for SharePoint for the following year. These numbers can be compared to see the initial savings and then use this data to create a five-year forecast for both scenarios to compare the savings.

The robust communication tools will allow for comprehensive virtual meetings and significantly fewer site visits. A communication protocol will need to be established and used for the first year. Throughout that year, a series of surveys should gauge how the employees are adapting to the new protocols and tools. The data from the surveys can be analyzed to see what is working and what needs to be changed.

The central cloud-based file storage and webpage setup will allow easy storage and access to documentation by all employees. As employees become comfortable using SharePoint

for general company functions, team sites implementation can encourage collaboration across the various locations, which will make each location feel connected to the other and the corporate headquarters. Once team sites are established, a series of surveys can be created and implemented to ensure employees are gaining value from their team sites and give them a chance to offer feedback on ways to improve.

## Conclusion

Angles of Care is growing at a rapid rate, adding locations and services nationwide. This rapid growth has resulted in a need for a centralized location for process documentation and communication to ensure client care does not suffer. In addition, Angels of Care executives have recognized the need to implement a technology solution that provides interconnectivity, communication, standardization, and connection amongst its staff. As Chief Operating Officer Randy Edmundson stated, “We've just really got to make sure we're giving our employees the information they need when they need it. And now with everyone remote, it's time to invest in something easy for us to use,” (*SharePoint Rollout Survey 2021*).

The organization has already committed to implementing SharePoint as a solution to this need; however, they need a technology rollout strategy to ensure content is ready and encourage employees to utilize the technology for training and communication. We suggest a change management plan that will include employee feedback to ensure all levels of the organization have a vested interest in the success of the technology rollout. The evaluation methods will ensure employees feel valued and have a way to contribute to the process, resulting in more acceptance and implementation of the technology rollout. The suggestions provided above will

help Angels of Care continue to use their HALOS to achieve their mission and vision to its much-needed patient base.

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