



Agency Operations Toolkit

Caregiver Retention Toolkit.

Five working tools to find where caregivers drop off — and fix the operating system behind hiring, onboarding and first-shift support.

BUILT FOR

Independent and mid-sized home-care agency owners in Canada

A practical companion to the article *"Why Home-Care Agencies Lose Caregivers"*

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Why this toolkit exists.

The labour market will not get easier. The agencies that win will waste fewer applicants after they apply.

Canadian home care is a local trust business that now competes in a national labour reality. Workers have options. Families expect reliability. Most agencies that lose caregivers are not losing them at the application stage — they are losing them between the application and the first shift, or in the first 30 days.

What the public data shows

26,200

Projected job openings for home support workers (2024–2033) against only 24,600 projected job seekers.

Source: Canadian Occupational Projection System, Job Bank.

49%

Share of the home support and caregiver workforce aged 50 or older in 2023.

Source: Job Bank, Government of Canada.

6,800

Additional home-care PSWs Ontario needs by 2028 just to maintain current service levels.

Source: Home Care Ontario / McMaster CHEPA.

73%

Paid care providers who have considered changing careers — citing low pay, thin staffing and safety.

Source: Canadian Centre for Caregiving Excellence.

The implication.

More job ads will not solve this. The labour pool is structurally tight and the workforce is aging. The agencies that win in the next five years will be the ones that waste fewer applicants after they apply — not the ones that buy more impressions.

What one lost caregiver costs you.

Most agencies underestimate this number because the cost is spread across the team.

Use the figures below as a working model. Fill in your own numbers in the third column — even rough estimates are enough to make the case to your team that fixing the funnel pays for itself many times over.

Hidden cost category	Typical range (CAD)	Your number	Notes
Recruitment ad spend (per hire that didn't stay)	\$200 – \$600	\$	
Manager screening + interview time (≈8 hrs × \$40/hr)	\$320	\$	
Onboarding admin + document chasing (≈4 hrs × \$35/hr)	\$140	\$	
Training delivered but not recouped	\$200 – \$500	\$	
Lost shifts / coverage scramble during transition	\$300 – \$1,200	\$	
Client confidence / family escalation risk	Hard to price — material	—	
Estimated cost per lost caregiver	\$1,160 – \$2,640	\$	<i>× lost caregivers this quarter</i>

Read this number twice.

If five caregivers drop off this quarter, you are spending \$5,800 – \$13,200 on people who never became active. That is the budget you need to fix the funnel.

How to use this toolkit.

Five tools. One operating loop. About 90 minutes the first time, 30 minutes a week after that.

The tools are sequenced. Each one builds on the diagnosis from the one before. Work through them in order the first time. After that, the Leak Finder and Scorecard become your weekly cadence; the other three are reference tools you return to as the team grows.

#	Tool	What it's for	Time
1	Caregiver Onboarding Leak Finder	Find the single stage where applicants and new hires are dropping off. Diagnostic — start here.	15 min
2	First-Shift Readiness Checklist	Prepare each caregiver before they enter the home. Use for every first shift.	5 min each
3	30-Day Caregiver Retention Scorecard	Track whether new hires are actually becoming active caregivers, and which sources produce stickers.	Weekly
4	Employee vs Contractor Decision Matrix	Choose the right staffing model for each role. Includes a five-question rubric.	Per role
5	Caregiver Hiring Workflow Template	Map the full applicant-to-active-caregiver workflow with owners and SLAs.	Once, then revise

Three working principles

01

Treat caregiver loss as an operating-system problem, not a recruitment problem.

More job ads bring more applicants into a leaky funnel. They do not fix the leak.

02

Measure the first 30 days, not just the first interview.

A new hire is not a caregiver until they have completed a first shift and a 7-day check-in.

03

The owner cannot be the retention system.

If support, follow-up and matching live in the owner's head, they don't scale and they don't survive a busy week.

Caregiver Onboarding Leak Finder.

Find the stage where applicants, new hires or first-shift caregivers are dropping off.

How to score

Score each stage from 0 to 2 based on what you actually see in your agency over the last 90 days. 0 = working well · 1 = some friction · 2 = serious leak. The benchmark column tells you what 'good' looks like.

Stage	Warning signs	What 'good' looks like	Your score	Fix first if...
Application	Applicants apply but do not respond when you reach out. High ghost rate.	<i>First response within 4 business hours; ≥60% of qualified applicants reply.</i>	0 1 2	Response takes more than 24 hours.
Screening	Unqualified candidates reach interviews; managers waste time.	<i>Minimum criteria checked automatically; ≥70% of interviews are qualified.</i>	0 1 2	No automatic screening rules in place.
Interview	No-shows or inconsistent hiring decisions across coordinators.	<i>≥75% interview show rate; same questions asked of every candidate.</i>	0 1 2	No structured interview guide.
Documents	Police checks, certificates or references stall for days or weeks.	<i>Documents complete in ≤3 business days; expiry tracking automated.</i>	0 1 2	Docs are tracked by email or memory.
Training	Caregivers finish onboarding but feel unready on shift one.	<i>Role-specific training (companion / dementia / overnight) completed before first shift.</i>	0 1 2	Training is generic or not role-specific.
First shift	Caregivers arrive without enough client context; first shifts go wrong.	<i>Care plan, route, risks and escalation path confirmed before shift starts.</i>	0 1 2	Care plan, route or escalation is unclear.
30 days	New hires go quiet, miss shifts or stop replying within a month.	<i>7-day check-in done for 100% of hires; 30-day active rate ≥75%.</i>	0 1 2	No structured 7-day or 30-day check-in.
TOTAL SCORE	<i>Sum your scores across all seven stages.</i>	<i>Use the interpretation guide below.</i>	/ 14	

Stage-specific first move — what to actually do this week

Find the row matching your highest score. Do that one thing this week. Do not try to fix all seven stages at once.

If your highest score is...	Do this first	Why it works
Application	Set a 4-hour response SLA	Even a one-line acknowledgment within 4 business hours doubles reply rates. Auto-reply now, human follow-up by end of day.
Screening	Write 3 disqualifier rules	Pick three minimum criteria (e.g. driver's license, ≥1 year care experience, available evenings). Filter before booking interviews.
Interview	Standardise 5 questions	Same five questions for every candidate, scored 1–3. Removes coordinator-by-coordinator variance and makes hiring comparable.
Documents	List required docs once, send once	One checklist sent at offer stage with deadlines. Stop chasing documents in scattered emails.
Training	Pick the top 3 in-field moments to train	Reading a care plan, documenting a visit, escalating a concern. Train those three before any first shift.
First shift	Make the Core 8 mandatory (Tool 2)	If the Core 8 isn't complete, the shift doesn't start. Postpone is cheaper than losing the caregiver.
30 days	Book the 7-day and 30-day check-in at hire	Calendar invite goes out when the offer is signed. Not 'we'll reach out' — a scheduled, time-bound conversation.

0 – 4

Mostly stable.

Focus on the stage with your highest single score. Improve one thing at a time.

5 – 8

Material leak.

Fix the two highest-scoring stages first. Use Tools 2, 3 and 5 to operationalise the fix.

9 +

System problem.

You don't have a recruitment problem alone — you have an operating-system problem. Start with Tool 5.

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First-Shift Readiness Checklist.

Run this before every first shift. The first shift is the first test of your operating system.

Step 1 · Classify the shift

Not every first shift carries the same risk. Mark which tier this shift falls into and apply the matching depth of preparation.

<input type="checkbox"/>	STANDARD	Companion care, light housekeeping, low-risk client, experienced caregiver.	Core 8 items below.
<input type="checkbox"/>	COMPLEX	Dementia or behavioural concerns, multiple medications, family expectations high, OR caregiver is new to this role type.	Core 8 + supervisor briefing before shift.
<input type="checkbox"/>	HIGH-RISK	Transfers, fall risk, palliative, complex meds, OR first shift in caregiver's first week.	Core 8 + supervisor briefing + supervisor on-call during shift + same-day debrief.

Step 2 · The Core 8 — confirm before the visit starts

Done?	Readiness item	What must be clear	Owner
<input type="checkbox"/>	Care plan reviewed	Tasks, routines, risks and family expectations are visible in writing — not relayed verbally.	Caregiver
<input type="checkbox"/>	Client risks understood	Falls, dementia behaviours, mobility, transfers, medication prompts, behaviour triggers.	Coordinator
<input type="checkbox"/>	Route and timing confirmed	Address, travel time, parking, entry instructions, shift start and end time.	Caregiver
<input type="checkbox"/>	Credentials complete	Police check, work eligibility, certificates and references on file, not expired.	HR / ATS
<input type="checkbox"/>	Documentation expectations clear	What to record, where to record it, when notes are due, who signs off.	Coordinator
<input type="checkbox"/>	Escalation path known	Specific names + numbers for care concerns, family questions, incidents, schedule issues.	Coordinator
<input type="checkbox"/>	Supervisor check-in scheduled	Time-bound touchpoint within the shift or immediately after. Not 'we'll check in soon.'	Supervisor
<input type="checkbox"/>	Caregiver has asked questions	Caregiver confirms they have everything they need. Silence is not consent.	Caregiver

Step 3 · 24-hour post-shift debrief

Five minutes by phone or message. This is the single highest-leverage retention conversation you will have.

1. What went well on the shift?	
2. What surprised you or didn't match the care plan?	
3. What would have helped you feel more prepared?	
4. On a scale of 1–5, how confident do you feel for the next shift?	
5. Do you want to continue with this client?	

Rule of thumb

Do not send a caregiver to a first shift with only an address and a phone number. If you cannot complete the Core 8, postpone the shift. Postponing is cheaper than losing the caregiver.

Three signs you got the first shift right

These are the leading indicators of 30-day retention. If you see all three from a new hire, your operating system is working.

1	The caregiver completed documentation without being chased. Notes, timestamps and check-ins arrived on time. This is the single best proxy for whether they understood what you expect.
2	The 24-hour debrief surfaced one specific learning. Not 'it went fine' — something concrete: a missing detail in the care plan, a route issue, a family question they didn't know how to answer. Specifics mean they were paying attention.
3	They asked when their next shift is. Caregivers who plan to leave don't ask. Caregivers who plan to stay want a calendar.

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30-Day Caregiver Retention Scorecard.

Use this weekly. The goal is to find the biggest drop-off before it becomes a staffing crisis.

Funnel health — this week

Metric	Target	This week	Status	Action this week
Time to first response	<i>Same business day</i>		● ● ●	
Interview show rate	<i>≥ 75%</i>		● ● ●	
Document completion time	<i>≤ 3 business days</i>		● ● ●	
Training completion before first shift	<i>100%</i>		● ● ●	
Time from hire to first shift	<i>≤ 7 days where possible</i>		● ● ●	
First-shift issue rate	<i>Track + review every escalation</i>		● ● ●	
7-day check-in completed	<i>100%</i>		● ● ●	
30-day active status	<i>≥ 75% of new hires</i>		● ● ●	

Source ROI Tracker — which channels produce caregivers who stay?

Volume is a vanity metric. What matters is which sources produce caregivers still active at 30 days, and what each one costs you net.

Source	Applicants	Hired	Active at 30d	Spend	Cost per active caregiver
Indeed					
Job Bank					
Facebook groups / community					
Caregiver referrals					
Direct applications via website					
School / training partnerships					

Red flags to watch this week

These patterns predict 30-day attrition before it shows up in your headcount. If you see two or more in the same week, treat it as a fire — not a trend.

Pattern	What it usually means
A new hire goes 48+ hours without responding to a message.	They have probably accepted another offer. Call directly today, not tomorrow.
First-shift confidence score drops below 3 / 5.	The shift went worse than the caregiver is admitting. Bring the supervisor into the next conversation.
One source produces > 50% of applicants but < 20% of 30-day actives.	You are subsidising a channel that doesn't convert. Cut the spend; redirect to the channel with the best cost per active.
A coordinator's hires churn faster than the team average.	The leak is not in recruitment — it is in how that coordinator runs onboarding. Audit their next two hires together.

Best source this month

Which channel produced the caregivers who stayed active? Double down here.

Notes:

Biggest leak to fix

Which stage caused the most drop-off in the last 30 days? Pick one to fix this week.

Notes:

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Employee vs Contractor Decision Matrix.

Choose the right model for each role. This is an operating tool — not legal advice.

A note on classification

Canadian worker classification depends on the substance of the relationship, not the label on an agreement. The CRA and provincial regulators look at control, tools, chance of profit, risk of loss and integration. Misclassification can trigger employment-standards and tax consequences. Use this matrix to decide what fits operationally, then review with legal and payroll advisers before finalising.

The three models at a glance

Model	Best used when...	Retention advantages	Watch-outs
Full-time / regular employees	Continuity matters, training is core, you have enough volume, client relationships need consistency.	Stronger attachment, clearer supervision, easier training, better matching.	Higher fixed cost; requires schedule discipline and enough hours to support.
Part-time employees	Demand is variable but you still need agency standards, supervision and a shared culture.	Good fit for flexible schedules and gradual activation; people can grow into more hours.	Fragmented availability; weaker attachment if hours stay inconsistent.
Independent contractors	Work is genuinely independent, specialized, project-based or overflow-only.	Adds flexibility and niche capacity without permanent overhead.	Classification risk if managed like employees; weaker loyalty and shift commitment.

Five-question rubric — score the role you're hiring for

Answer each question for the specific role. Tally the E's and the C's. The leaning column tells you what the answer suggests, but the legal call still goes back to substance of the relationship.

#	Question	Yes leans →	No leans →	Y / N
1	Will the same caregiver typically serve the same client week after week?	Employee	Contractor	
2	Do you control the schedule, tools, processes and care standards?	Employee	Contractor	
3	Do you provide training, supervision and onboarding to your standard?	Employee	Contractor	
4	Is the work specialized, project-based or genuinely flexible in nature?	Contractor	Employee	
5	Can the worker realistically profit or lose money based on their own decisions (clients, pricing, methods)?	Contractor	Employee	

Three classification traps to avoid

These are common patterns where home-care agencies treat someone as a contractor on paper but operate like an employer in practice. Each one creates legal and retention risk.

Trap	What it looks like	Operating fix
The 'contractor' on a fixed weekly schedule	Caregiver works the same Monday–Friday hours with the same client, takes direction from a coordinator, uses your care notes.	This is an employee. Re-paper as part-time employment and apply your standard onboarding.
The 'contractor' you train	Agency-mandated training, agency policies, agency uniforms, agency client list — but a contractor agreement.	Training and uniforms point to employment. Either step back operationally or convert the relationship.
The 'gig' caregiver with no real choice	Caregiver gets shifts only from your platform, cannot decline without penalty, has no other clients.	Economic dependence usually fails the contractor test. Offer part-time employment with guaranteed minimum hours.

If 3+ answers point to Employee

This is an employee role. Hiring it as a contractor creates classification risk and usually erodes retention. Use part-time employment if hours are variable.

If 4+ answers point to Contractor

A contractor relationship may fit, but document it carefully. Don't manage them like an employee. Have a lawyer review the agreement.

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Caregiver Hiring Workflow Template.

Map your applicant-to-active-caregiver workflow. Assign owners. Define SLAs. Review weekly.

How to use this template

Fill in the Owner, SLA (service level — how fast it must happen) and Tool columns for your agency. The goal is to make the workflow legible to everyone, not just the owner. If the workflow lives only in your head, it doesn't survive a busy week.

#	Step	What happens	SLA	Owner / Tool
1	Define worker profiles	Role, geography, availability, skills, shift types. Refresh quarterly.	—	
2	Source applicants	Active channels, referral program, partnerships. Track by source (see Tool 3).	<i>Daily / weekly</i>	
3	Screen for fit	Minimum requirements, eligibility, background check pre-flight, availability match.	<i>Within 4 hours</i>	
4	Interview consistently	Structured questions, scenarios, judgment signals, client-fit notes.	<i>Within 5 business days</i>	
5	Complete documents fast	Police check, work eligibility, certificates, references, expiry tracking.	<i>≤ 3 business days</i>	
6	Onboard and train	Agency orientation, role-specific training, platform / tool training, policy review.	<i>Before first shift</i>	
7	Match to first client	Role fit, geography, schedule, complexity tier (see Tool 2), caregiver preferences.	<i>Within 7 days of hire</i>	
8	Prepare the first shift	Run the First-Shift Readiness Checklist (Tool 2). Confirm before the visit starts.	<i>Day-before review</i>	
9	Run the 24-hour debrief	Five-minute debrief by phone or message. Capture issues, score confidence.	<i>Within 24 hours of shift</i>	
10	30-day check-in	Structured review. Confirm active status. Feed learnings back into Tool 3.	<i>Day 30 of hire</i>	

The feedback loop is the workflow.

Steps 8, 9 and 10 produce signal — first-shift issues, refusals, supervisor notes, 30-day retention by source.

That signal should feed back into Steps 1, 3 and 4. Refine the profile. Tighten the screening. Adjust the interview. A hiring workflow without a feedback loop is just a checklist.

Three patterns that quietly break this workflow

Most agencies don't fail at hiring caregivers — they fail at owning the workflow. Watch for these.

No single owner per step.	If 'the team' owns Step 5, no one does. Every step needs a name in the Owner column — including the owner role's job title, not just a person.
SLAs that exist only in your head.	An SLA that isn't written, measured and reviewed is just hope. Put the SLA on the workflow document, then track misses weekly in the Scorecard (Tool 3).
No feedback from Steps 8–10 back to Steps 1–4.	When first shifts go wrong or new hires churn, the workflow has to update. If Step 6 keeps shipping the same training, you'll keep losing caregivers the same way.

OWNER ACTION

Pick one weak step this week.

Rewrite the workflow line for that step. Assign an owner. Define the SLA. Review every Friday until the leak closes. One step at a time beats trying to fix everything at once.

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Your 30-day action plan.

If you only do four things with this toolkit, do these — in this order.

Week	Focus	What to do	Tool
Week 1	Diagnose the leak	Run the Caregiver Onboarding Leak Finder (Tool 1) with your coordinator and one supervisor. Score honestly. Pick the single highest-scoring stage. Don't try to fix more than one thing this month.	Tool 1
Week 2	Prepare every first shift	Apply the First-Shift Readiness Checklist (Tool 2) to every new caregiver starting this week. Classify each shift. Run the 24-hour debrief — no exceptions.	Tool 2
Week 3	Build the scorecard	Stand up the 30-Day Retention Scorecard (Tool 3) for the current hiring cohort. Start the Source ROI tracker even if the numbers are rough. You can refine later.	Tool 3
Week 4	Operationalise the workflow	Fill in the Hiring Workflow Template (Tool 5) with real owners and SLAs for your team. Review the staffing mix for one role using Tool 4. Set a recurring Friday review.	Tools 4 + 5

After 30 days

- ▶ Run the Leak Finder again. Has your highest-scoring stage moved? If yes, attack the new top stage. If no, the fix isn't sticking — go deeper on root cause.
- ▶ Compare 30-day retention by source. Cut spend on the channel with the worst cost per active caregiver. Reinvest in the best.
- ▶ Review one role under the Employee vs Contractor matrix every quarter. Classification drift is silent — most agencies don't realise it until there's a complaint.
- ▶ Promote the Friday review from optional to recurring. Fifteen minutes a week against the Scorecard is enough to keep the funnel honest.

If you can only remember one thing.

Caregiver loss is not a recruitment problem — it's an operating-system problem. More job ads bring more applicants into a leaky funnel. Fix the leak and every dollar of recruitment spend works harder.

Built by operators.

Built for operators.

ConsidraCare is an agency-in-a-box platform for home-care operators. We ran a full home-care service business for four years before pivoting to software — which means our platform is built around what actually breaks when you try to grow an agency: caregiver onboarding, document compliance, scheduling, care plans, family communication and first-shift readiness.

The toolkit you've just worked through is a paper version of the loop the platform runs continuously. If the leaks you found in your own agency are the kind you'd rather not solve manually, talk to us.

01

Free agency audit

We'll walk through your funnel together and show you where it leaks. 30 minutes. No pitch.

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02

Join the partner pilot

We're onboarding a small cohort of growth-minded agencies to the platform. Concierge setup, founder-led support.

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