



Futureproofing Your Workforce

**Strategies to Address Shortages
& Build Capacity**

Presenters:

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At Council on Aging, we enjoy a mission-driven, teamwork focused culture...that we'd love for **you** to join!



Council on Aging is seeking **licensed social workers** and **registered nurses** to join our care management team and make a difference every day!



WHY WORKFORCE FUTUREPROOFING MATTERS

- 1 Critical organizational knowledge often resides with only a few individuals.
- 2 Workforce planning must address today's staffing pressures while preparing for the next 3 years.
- 3 Organizations are facing ongoing challenges in finding, onboarding, developing, and retaining talent.
- 4 Futureproofing requires intentional alignment of strategy, structure, culture, technology, and leadership development.

STARTING WITH STRUCTURE

Structure: *The act of building or the arrangement of parts in a system. (Merriam-Webster)*





Intentional Alignment starts at the top with ensuring that Human Resources has a seat at the executive table!

HR IN THE C-SUITE



- Strategic Role of CHRO
 - The CHRO must be a core executive, directly influencing key business strategies at the C-suite level.
- Aligning Workforce and Business Goals
 - Embedding HR leadership helps align workforce planning, talent development, and culture with business objectives.
- Navigating Complex Business Environment
 - The CHRO ensures workforce considerations support agility, resilience, and competitiveness in a changing market.

GOVERNANCE, RISK, AND CEO ADVISORY

- Workforce Risk Management
 - CHRO addresses workforce risks ensuring compliance with labor laws and promoting workplace safety and ethical conduct.
- Leadership Advisory Role
 - CHRO provides insights on leadership effectiveness, succession planning, and organizational health to board and executives.
- Balancing Priorities and Conflict Resolution
 - CHRO serves as a neutral advisor helping mediate conflicts and balance priorities during uncertain or rapid change.
- Integrating People in Strategy
 - CHRO ensures people-related considerations are integrated into governance and strategic decision-making for better outcomes.



ALIGNMENT OF WORKFORCE STRATEGY

- Strategic Workforce Planning
 - CHROs translate high-level business strategies into actionable workforce plans supporting organizational goals.
- Integration in Strategic Plan Initiatives
 - CHROs ensure people considerations are top-of-mind when executing strategic plan initiatives.
- Enhancing Organizational Effectiveness
 - Alignment between workforce and organizational strategy reduces execution gaps and boosts effectiveness.
- Proactive Talent Management
 - CHROs anticipate workforce challenges and address talent shortages to meet strategic objectives.



CULTURE, ENGAGEMENT, AND CHANGE LEADERSHIP



Shaping organizational culture:

The CHRO creates a positive and inclusive culture fostering collaboration, innovation, and employee well-being.



Enhancing employee engagement:

Driving inclusion strategies and improving employee experience increases engagement at all organizational levels.



Leading change initiatives:

CHROs manage digital adoption, restructuring, and service model changes with clear communication and leadership support.

TREATING HUMAN CAPITAL AS A CORE ASSET

- Strategic Role of HR
 - HR leadership in the C-suite highlights human capital as essential for driving organizational success and value creation.
- Talent Retention and Workforce Planning
 - Focusing on employee retention and succession planning strengthens talent pipelines and reduces turnover.
- Competitive Advantage through Human Capital
 - Unique culture, talent, and institutional knowledge create a competitive edge that is hard to replicate.
- Enhancing Employee Engagement
 - Implementing performance management and career development boosts productivity and aligns workforce with company goals.



CHRO essential elements:

Strategic Talent Driver

The CHRO model adds value when talent drives growth, innovation, and organizational success.

HR as Strategic Partner

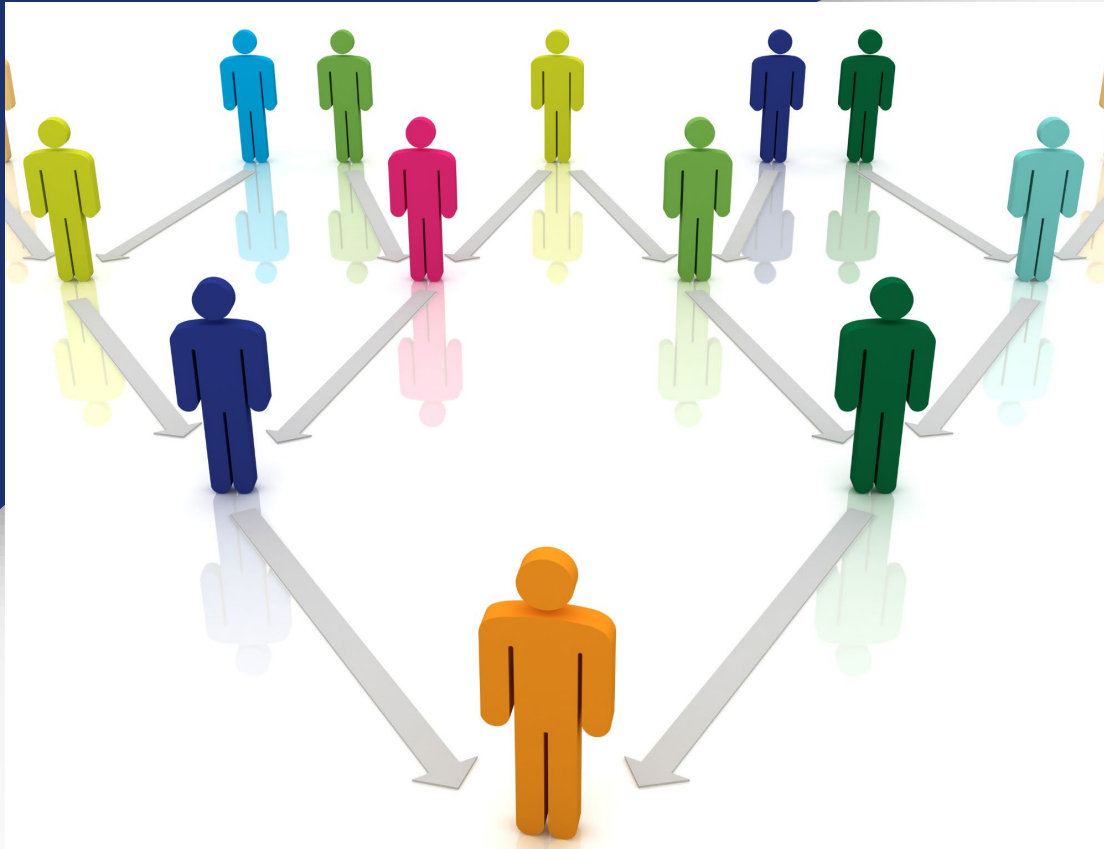
Effectiveness increases when HR functions as an enterprise strategy contributor, not just support. HR shouldn't be viewed only as an administrative function.

Leadership Capability

Success depends on CHROs who think and act as organizational leaders, driving organizational objectives.

Limitations of Compliance Focus

Focus on compliance limits HR's influence, reducing the CHRO model's strategic value.



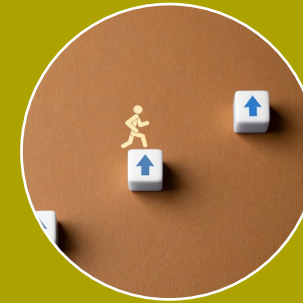
IMPLEMENTING THE STRATEGIC PLAN



Provides the foundation for workforce decisions.



People strategies should directly support organizational priorities.



Workforce planning becomes stronger when employee issues are visible at the executive level.



IMPLEMENTING THE STRATEGIC PLAN

Council on Aging's 2026-2030 strategic plan excerpt:

Strategic Theme #3: Strengthen COA's Infrastructure and Build a Strong Organizational Culture.						
15	Ensure we are a high performing organization that can compete and retain top talent while remaining competitively positioned with the market.	New			X	Program & Planning and Human Resources
16	Balance a psychologically safe environment while also ensuring accountability.	New	X			Human Resources
17	Enhance employee engagement and inclusion by implementing "mindful leadership" to enhance employee recognition, reduce silos, and enhance communication.	Revised			X	Human Resources
18	Use data and dashboards to measure performance and support operational decision-making.	New	X			Program & Planning and Finance & Compliance
19	Adopt and integrate an agency-wide Quality Management Program and learning culture, rooted in compliance, quality improvement and innovation.	New	X			Finance & Compliance and Human Resources
20	Expand and promote opportunities for professional growth, succession planning and development at all levels.	Revised			X	Human Resources

FROM THE BOARD ROOM TO THE FRONT LINE

*Bridging the gap between
idea and impact.*



TRANSLATING STRATEGY INTO OPERATIONS



- 1 Cascade the strategic plan into the HR business plan.
- 2 Translate HR priorities into staff Major Work Objectives.
- 3 Create clear connections between organizational goals, department goals, and individual contributions.
- 4 Use this alignment to focus resources, accountability, and communication.

ALIGNING HR SYSTEMS AND STRUCTURES

1

Workforce
Analysis and
System Design

2

Recruitment
and Retention

3

Culture and
Employee
Experience

4

Succession
Planning and
Career
Development

5

Performance
Management
and
Compensation

Workforce Analysis and System Design

Budget and
Caseload
Analysis

Contract
Requirements

Staffing Model
Analysis

Vacancy
Analysis

RECRUITMENT IN A COMPETITIVE LABOR MARKET

- 1 Recruitment strategies must reflect the realities of the local and state labor market.
- 2 Recognize competition. Ours includes hospital systems and managed care organizations operating in LTSS.
- 3 Understand higher-paying employers may attract candidates away from organizational roles. Determine your game plan.
- 4 Effective recruitment requires clear messaging, authentic stories, and visible career pathways.



WORKFORCE ANALYSIS AND STATE OF ENVIRONMENT

- Changing markets for care/case management
 - Clinical
 - Coordination
 - Care Transition
- Increase compensation requirements
- Licensure requirements
- Managed care competition
- Decrease in students majoring in social work
- Baby boomers retiring or leaving the field
- Community awareness about geriatric social work and care management
- Baby boomers entering aging population



WORKFORCE ANALYSIS AND STATE OF ORGANIZATION

- Shortage of licensed social workers interested in geriatric social work
- Unable to retain nurses
 - Nurses thrive in more hands-on clinical work environment
- Competition with managed care providers and hospitals
- Flexible workforce to adjust to needs of multiple generations in the workplace
- Competitive benefits and compensation
- Managing an effective and efficient remote workforce
- Staff development and succession planning
- Rising turnover and increase in retention rate
- Meeting contract compliance with constant turnover



“

The United States is facing a massive social worker shortage by 2030. There are already serious regional shortages in rural areas and specific states, but the shortfall will equal tens of thousands of professionals nationwide in just a few years. How many social workers do we have, and how many do we need? What factors are contributing to the social worker shortage? And more importantly, what can be done about it?

The Realtime Report

”

FACTORS CONTRIBUTING TO SOCIAL WORKER SHORTAGE

Relatively high educational requirements required for the job

Lack of funding and incentives for workers in rural areas

Incredible professional demands

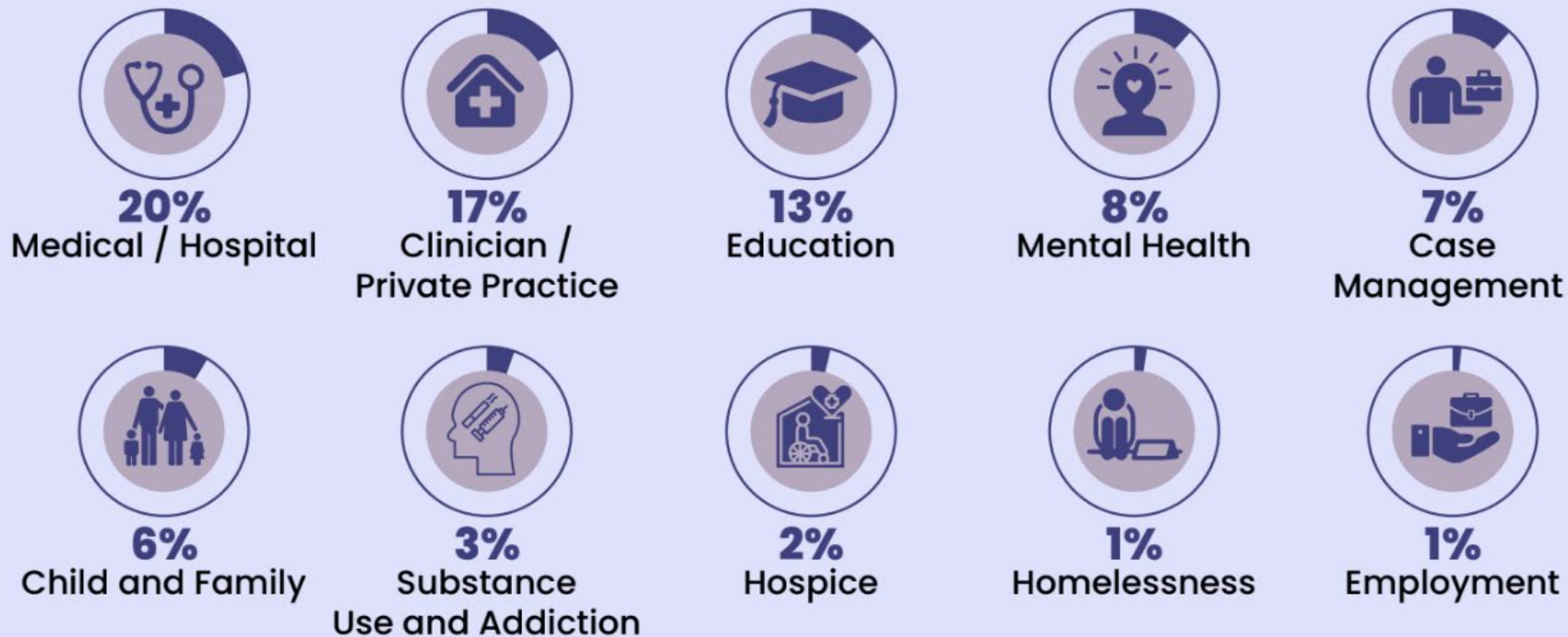
The increasing complexity of **challenges that social workers face**

The looming retirement wave hitting the profession

Burnout

ASSOCIATION OF SOCIAL WORK BOARD (ASWB) EXAM IN 2023 DATA

Top 10 Categories of Social Work Represented



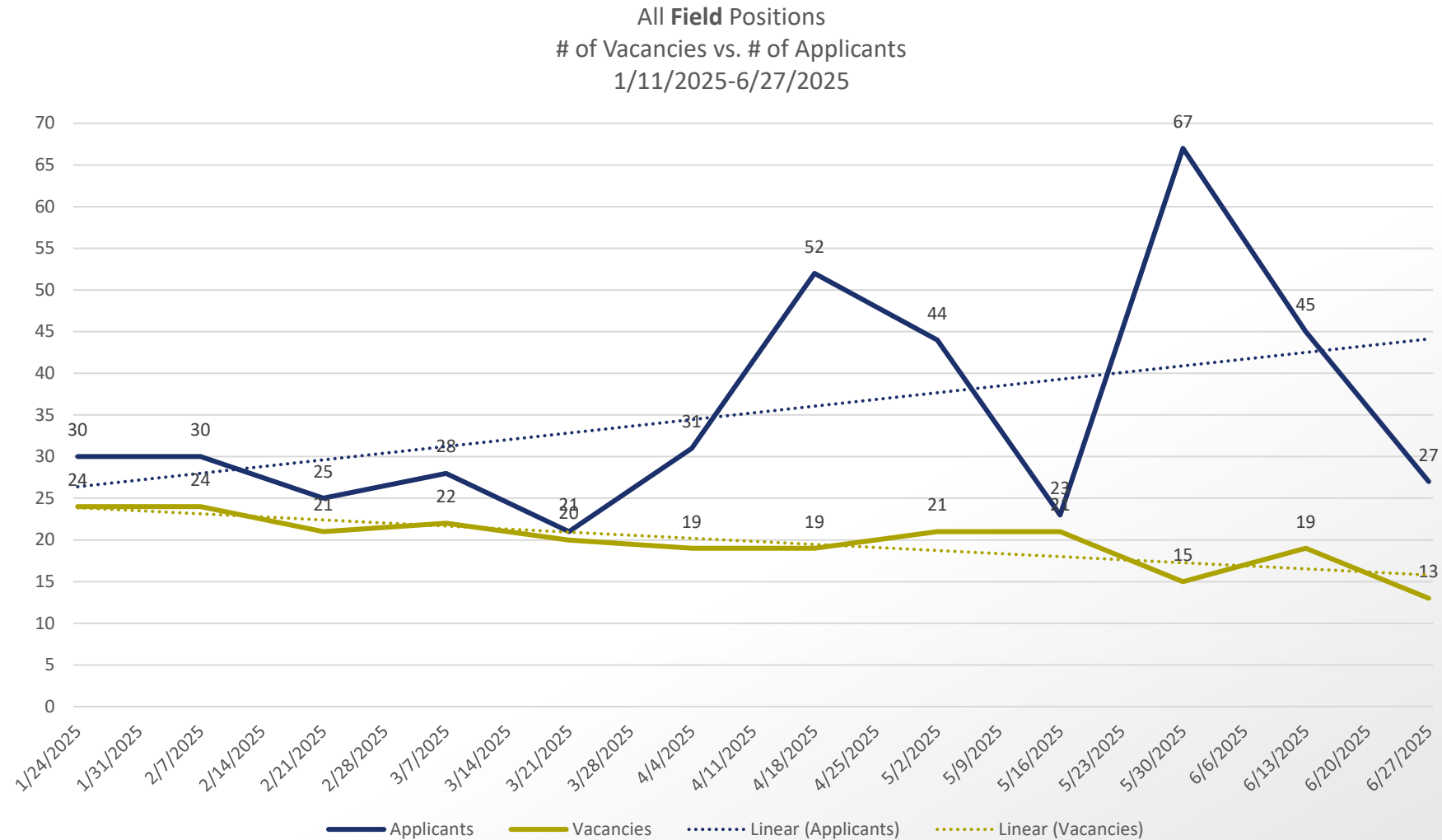
Turning Strategies into Operational Opportunities

RECRUITMENT STRATEGIES THAT BUILD CAPACITY

- 1 Use employee videos to communicate mission, culture, and career impact
- 2 Leverage communication and marketing campaign and targeted recruiting techniques
- 3 Build relationships with colleges and universities
- 4 Develop pipeline programs such as the Emerging Professionals Program
- 5 Connect recruitment messaging to create long-term career growth

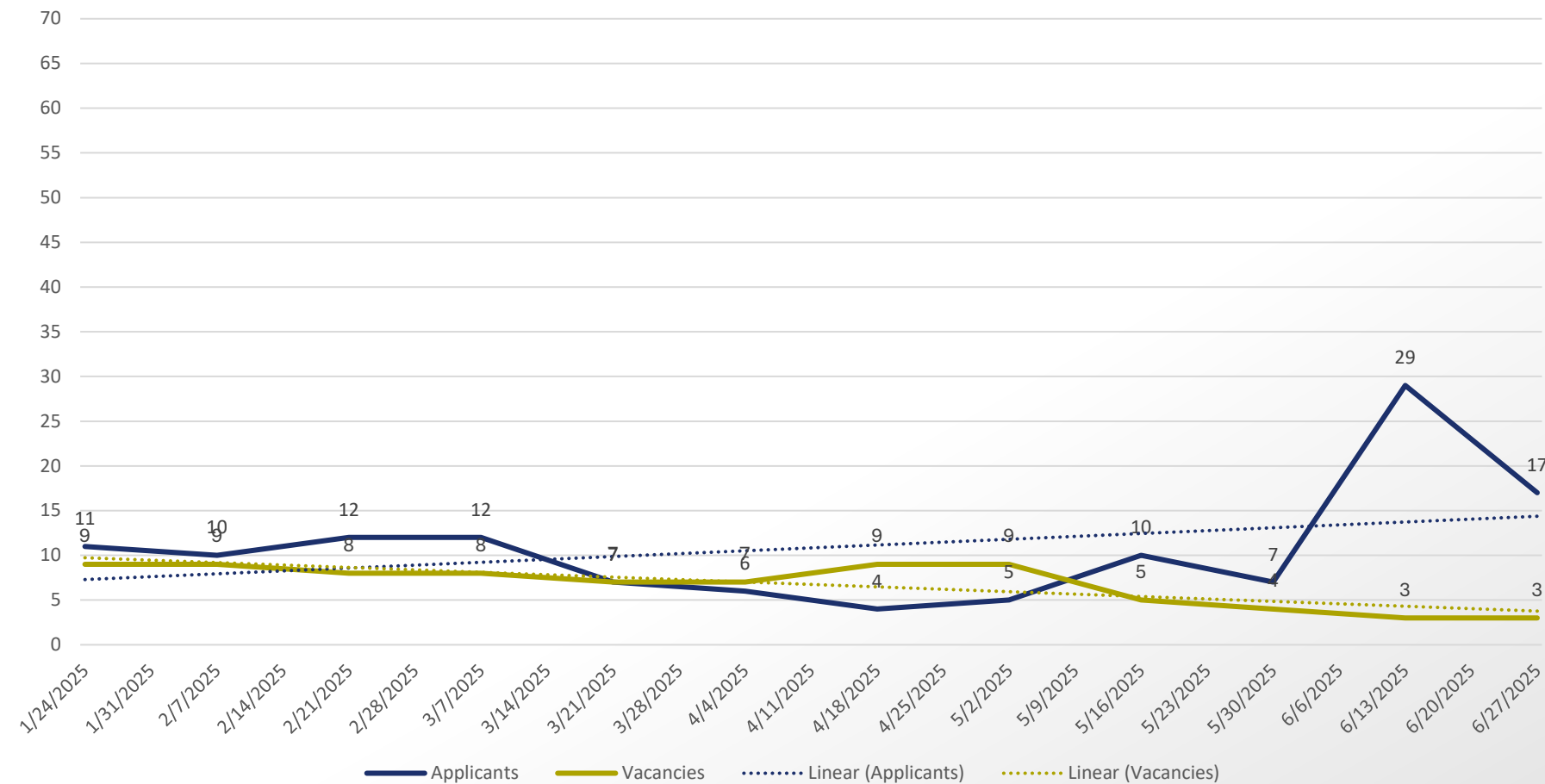


RECRUITMENT STRATEGIES THAT BUILD CAPACITY



RECRUITMENT STRATEGIES THAT BUILD CAPACITY

All Field Aetna Positions
of Vacancies vs. # of Applicants
1/11/2025-6/27/2025



WHAT WE LEARNED: INCENTIVES ALONE ARE NOT ENOUGH

1

Retention bonuses did not fully solve the issue.

2

Sign-on bonuses were not enough to address long-term staffing challenges.

3

Short-term incentives may help temporarily but do not replace culture, workload support, and career development.

4

Sustainable workforce strategies require structural solutions.

RETENTION THROUGH CONNECTION AND SUPPORT

Peer-to-peer mentoring, professional mentoring, and self-directed teams.

Employee advocates hold check-in meetings with new hires.

New hire and employee luncheons.

Recognition activities, including Care Manager and COA Employee of the Year

Manager onboarding checklist, individual retention plan for employees. Senior leadership orientation and touchpoints.

Town hall meetings, surveys, focus groups, and visible follow-up.

CULTURE AS A RETENTION STRATEGY

Reinforcement of
values and strategic
plan.

Town hall meetings,
division, department,
and self-directed
team meetings.

Community outreach
and recruitment
opportunities to build
skills.

Monthly summer
events and food
trucks.

Wellness and
financial seminars.

Maintaining
competitive benefits
and compensation
strategies.

ADDRESSING WORKLOAD AND BURNOUT

1

Short-term caseload solutions can create unintended burnout.

2

Workload pressure must be addressed structurally, not only through temporary incentives.

3

Leadership requested board support to hire additional staff and reduce caseload sizes.

4

Budget decisions can become a critical workforce retention strategy.

ADDRESSING WORKLOAD AND BURNOUT

	Molina	Anthem	CareSource	Buckeye					
Census at the end of the FY'26 (max value)	2638	1428	916	16	4998				75
Needed WSC to have 75 max case loads	35	19	12	0.5					
Caseload with available WSC	75	75	76	15					
	Molina	Anthem	CareSource	Buckeye	Needed	Old need	Change	Existing	Short
Manager	1	1	1		3	3	0	3	0
Waiver Service Coordinator (including Senior WSC)	34.5	19	12	0.5	66	65	1	62	-4
Supervisor 12:1 ratio	3.5	2	1	0.5	7	7	0	7	0
Care Coordination Specialist 6:1 ratio	6	3	2	0	11	11	0	14	3
Senior Care Coordinator Specialist**shared across two plans	0.5	0	0	0.5	1	1	0	1	0
Initial Assessor (Initial home visits, annuals)	1	1	1	0	3	3	0	3.4	0.4
Critical incident coverage team	0	0	0	0	0	0	0	0	0
CCS Supervisor Non Licenced - **may share across two plans	0	0.5	0.5	0	1	1	0	1	0
	46.5	26.5	17.5		92	91	1		
						0	0		
Director	0.6				0.6	1	-0.4	1	0.4
Program Assistant	1	0.5	0.5		2	2	0	2	0
Medical Advisor	0.09				0.09	0.09	0	0	-0.09
	48.19	27	18		94.69	94.09	0.6		
						0	0		
Floater	2	1	0.5		3.5	4	-0.5	3	-0.5
Hire-Ahead WSC	2	1	1	0	4	12	-8.00	3	-1
						0	0		
Total WSC needed	39.5	22	14.5	0.5	76.5	84	-7.50	71.4	-5.1

SUCCESSION PLANNING AND CAREER DEVELOPMENT

Emerging Professionals Program.

Levy Development Program.

Team and New Hire Educators to support training and the Learning Academy.

Manager and director training programs to build on-the-job training skills.

LISW Group Supervision, Certified Care Management program and Project Management Certification.

Career Navigation Program and Development Pathways.

PERFORMANCE MANAGEMENT AND COMPENSATION

- 1 Performance management should reinforce strategic priorities, values, development opportunities, learning and recognition.
- 2 Compensation planning must support recruitment, retention, recognition, career development, and fairness.
- 3 Clear systems help employees understand expectations, structure, culture, growth opportunities, recognition, and rewards.
- 4 Compensation plans are one part of a broader workforce sustainability strategy.



SYSTEMS THAT SUPPORT PEOPLE: OPERATIONS

Financial Systems
through staffing and
cost model analysis
and the budget
process.

Data Management
through Business
Intelligence systems
and caseload analysis
processes.

Communication
Systems through
recruitment and
retention efforts.

Information Technology
Systems through
support and programs.

Program Development
systems through
partnership and
collaboration.

Compliance Systems
through caseload
reviews and contract
compliance.

BUDGETING AS A WORKFORCE STRATEGY

- 1 Senior team budget preparation creates shared understanding of staffing needs.
- 2 Annual budget training strengthens manager learning and capability.
- 3 Biweekly budget staffing meetings to align programs, budget and recruitment and to also improve coordination and visibility of gaps.
- 4 Established position numbers to support staffing roster management and long-term planning for budgeting, compliance, and recruitment.



BUSINESS INTELLIGENCE AS A WORKFORCE STRATEGY

- 1 Use data to understand retention trends and workforce risks.
- 2 Build cost models that clarify the impact of staffing decisions.
- 3 Use staffing models to anticipate needs and support planning.
- 4 Analyze caseload data to identify workload concerns and justify solutions.



COA ALIGNMENT AND ENGAGEMENT REPORT

Alignment and Engagement

.2%

EMPLOYEE
TURNOVER

Based on the total
number of employees
at the end of Nov 25
(401)



57%

EMPLOYEE NET
PROMOTER
SCORE

Based on 213 survey
respondents



99.8%

EMPLOYEE
RETENTION RATE

Based on the total
number of employees
at the end of Nov 25
(401)



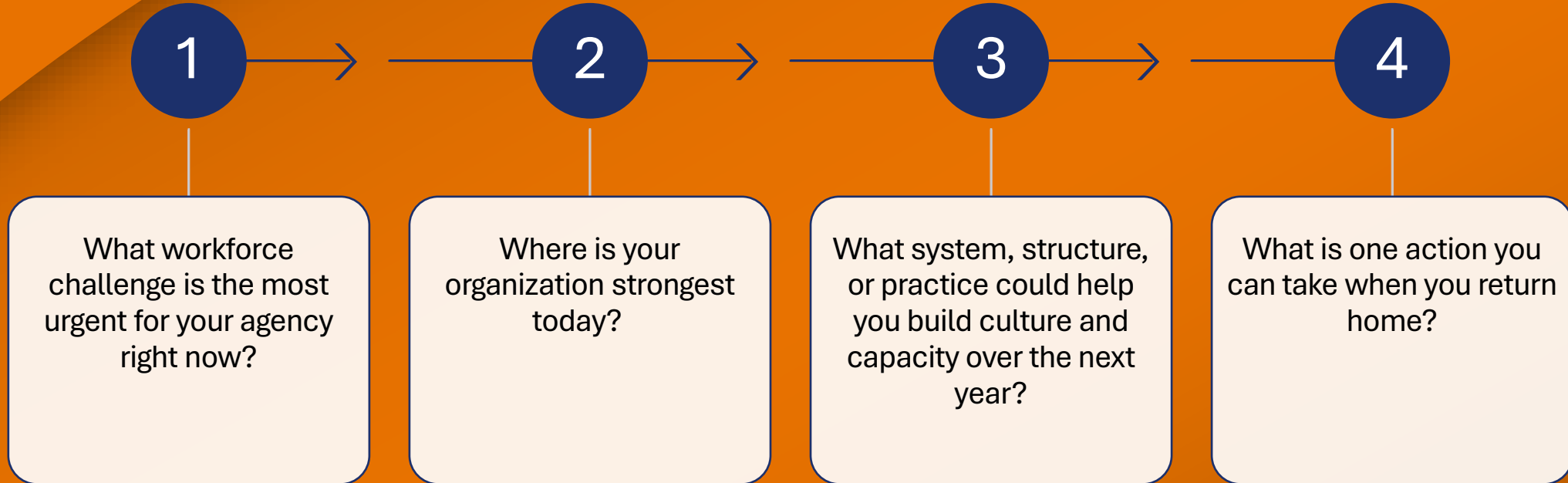
.8% from Last Month

A good Net Promoter Score (NPS) typically falls between **0 and 30**, while a score **above 50** is considered excellent, and **70+** is world-class.

KEY TAKEAWAYS

- 1 Start with the strategic plan and connect HR directly to organizational goals.
- 2 Position HR as a strategic voice at the executive table.
- 3 Align recruitment, retention, culture, development, compensation, budget, and data systems to ensure program and financial success.
- 4 Use both employee voice and business intelligence to guide decisions.
- 5 Build culture and capacity intentionally so the organization is stronger today and prepared for the future.

DISCUSSION AND QUESTIONS





Thank You!

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