

# HR Basics for Success

- ▶ Senior Living & Long-Term Care — Oklahoma (Present Environment)
- ▶ Presenter: Patrick Grafton, HR Business Partner
- ▶ Date: 9/10/2025 & 9/11/2025

# Agenda

- ▶ Oklahoma landscape & demographics
- ▶ Regulatory & funding context
- ▶ Workforce realities: staffing + retention
- ▶ HR core practices for compliance & quality
- ▶ Recruitment, training, and culture strategies
- ▶ Technology, partnerships, and operations
- ▶ Case study (example & lessons)
- ▶ Action plan & checklist

# Oklahoma Snapshot (Demographics & Demand)

- ▶ By 2030, nearly 1 in 5 Oklahomans will be over age 65.
- ▶ Oklahoma's rural population makes staffing and care access difficult.
- ▶ Senior living and LTC demand is projected to outpace available beds in some regions.

# Regulatory Environment — State & Federal

- ▶ State: OK Dept. of Health regulates LTC under Chapters 663 & 675.
- ▶ Federal: CMS mandates compliance, staffing, QAPI, reporting.
- ▶ Current: Federal staffing mandate challenged; state rules remain active.

# Funding & Reimbursement Realities

- ▶ Medicaid (Soonercare) pays most residents but often below cost.
- ▶ Facilities rely on state quality fees & appropriations.
- ▶ Tight margins limit competitive wages.

# Workforce Reality: Shortages & Turnover

- ▶ Average CNA turnover exceeds 40% annually in Oklahoma.
- ▶ Rural areas face CNA and LPN/LVN shortages.
- ▶ Competition from hospitals & traveling nurse agencies worsens challenges.

# Core HR Priorities for Success

- ▶ Compliance-first policies and documentation.
- ▶ Strategic workforce planning.
- ▶ Competitive pay/benefits.
- ▶ Robust onboarding & training.
- ▶ Culture of recognition & inclusion.

# Recruitment Tactics That Work in Oklahoma

- ▶ Partnerships with CNA/nursing programs.
- ▶ Sponsor CNA courses or stipends.
- ▶ Showcase career growth opportunities.
- ▶ Use referral bonuses & flexible schedules.



# Retention & Development Strategies

- ▶ Mentorship/preceptor programs.
- ▶ Pay ladders tied to certifications.
- ▶ Micro-learning & CE options.
- ▶ Regular recognition programs.
- ▶ Culture survey's - must be brief and regularly scheduled.

# Compliance, Safety, and Quality HR Practices

- ▶ Accurate personnel files, licensure tracking.
- ▶ Promote Just Culture & error reporting.
- ▶ Mock surveys for readiness.
- ▶ Update infection & emergency policies.

# Technology & Operational Supports

- ▶ Scheduling software reduces agency/overtime.
- ▶ E-learning platforms track training.
- ▶ Dashboards monitor staffing, turnover, compliance.

# Community & Payer Partnerships

- ▶ Partner with hospitals for care transitions.
- ▶ Use workforce boards & grants.
- ▶ Involve families & ombudsman programs early.

# Action Plan & 90-Day Checklist

- ▶ First 30 days: Audit files, review gaps.
- ▶ 30-60 days: Launch recruitment, adjust pay, recognition program.
- ▶ 60-90 days: Mentorship, pilot scheduling tech, dashboard reporting.

# KPIs & Dashboard Suggestions

- ▶ Turnover rate (by role).
- ▶ Vacancy rate & time-to-fill.
- ▶ Overtime/agency spend.
- ▶ Training completion compliance.
- ▶ Resident satisfaction & survey citations.

# Resources & Next Steps

- ▶ Oklahoma State Dept. of Health – LTC rules.
- ▶ SoonerCare/Medicaid contacts.
- ▶ Local workforce boards & education partners.
- ▶ OKALA - membership, and plug in to this community
- ▶ Some reading for you - “Inspire Greatness” by Matt Tenney
- ▶ SHRM - Society for Human Resources Management
- ▶ ChatGPT, Claude, and other AI resources can be invaluable - job descriptions, policies, culture survey questions, coaching tools - but be careful! Have a reliable review source for more complicated matters.



Questions?



# End

- ▶ Thank you —
  - ▶ Email: [Patrick.grafton3@gmail.com](mailto:Patrick.grafton3@gmail.com)
  - ▶ Phone: 713-344-3118
- ▶ Call to action: approve pilot, fund recruitment, schedule workshop. **Whether you've decided to approve bringing HR into your community on an FTE basis and you're going to pursue that, your going to create a brief culture survey for your community to working on the engagement of your employees, or you're going to build our a plan to create a red carpet onboarding experience. Pick something that you feel will best serve your residents, and set it in motion today!**