

# Home Instead Business Glossary

*System-agnostic business terms and related metrics*

*In order to be the Best Home Care Company with decisions driven by data, we must speak a common language. The Home Instead Business Glossary creates common terms, definitions and formulas to build a clear and consistent foundation that will unify performance measurements, business processes and data points for all stakeholders in the global network.*



## Table of Contents

Home Instead Business Glossary.....	1
Table of Contents.....	1
Business Terms: .....	4
Service Inquiry.....	4
Active Client .....	4
Client Pending Service.....	4
Terminated No Service Client .....	4
Client Served .....	4
Temporarily Deactivated Client .....	4
Service Ended Client .....	4
CAREGiver Inquiry.....	5
Applicant .....	5
Candidate .....	5
Pre-employment Screening .....	5
Hired Employee.....	5
Active CAREGiver .....	5
CAREGiver Pending Work.....	6
Terminated No Service CAREGiver .....	6
Working CAREGiver.....	6
Temporarily Deactivated CAREGiver .....	6
Terminated CAREGiver.....	6
Owner Inquiry .....	6
Prospect (Owner) .....	6
Owner .....	7
Franchise .....	7

Legal Entity.....	7
Exclusive Area .....	7
Office.....	7
Contact.....	7
Franchise Number.....	7
Franchise Inception Date .....	8
Renewal Date .....	8
Franchise Setback Date .....	8
Performance Standard .....	8
Underperforming Franchise.....	8
Age of the Franchised Business (Performance Standard).....	8
Voluntary Split.....	9
Senior Population (Performance Standard).....	9
Franchise Owner Anniversary Date .....	9
Metrics: .....	9
Conversion Rate (Service Inquiry).....	9
Close Rate .....	9
Sales Rate .....	9
Client Hours Served.....	9
Average Hours per Client .....	10
Client Service Rate .....	10
Client Turnover Rate .....	10
Client Tenure.....	10
Application Conversion Rate.....	10
Hire Rate .....	10
Hours Utilization Rate .....	10
CAREGiver Utilization Rate.....	11
CAREGiver Turnover Rate .....	11
CAREGiver Tenure.....	11
Inquiry to CAF Conversion (confidential application form) .....	11
CAF to Owner Conversion (confidential application form).....	11
Inquiry to Owner Conversion.....	11



## Business Terms:

### Service Inquiry

Someone looking for service with Home Instead making contact through any channel. Channels include but are not limited to: Service web forms and trackable calls generated from Partnerships, Search Marketing, Social Media, and Websites; RPN Referral contact; Walk-in; Direct phone calls generated by TV, Radio, Print, Word of Mouth, etc.

Domain Experts: Katie Cox, Doug McCall

Decision Date: 11/27/2018

### Active Client

Someone with an executed service agreement available to receive service from Home Instead

Domain Experts: Matt Hurley, Cory Jensen

Updated Date: 07/09/2019

### Client Pending Service

A client who is available to be served but has not yet had service

Domain Experts: Matt Hurley, Cory Jensen

Decision Date: 10/1/2019

### Terminated No Service Client

A client who ends relationship with Home Instead with no service

Domain Experts: Matt Hurley, Cory Jensen

Decision Date: 1/18/2019

### Client Served

A client who had service during a specified period and billing amount was greater than 0

Domain Experts: Matt Hurley, Cory Jensen

Decision Date: 1/18/2019

### Temporarily Deactivated Client

A client that is temporarily not available to be served.

Domain Experts: Matt Hurley, Cory Jensen

Decision Date: 1/18/2019

### Service Ended Client

A client who ends services with Home Instead. Excludes Temporarily Deactivated Clients

Domain Experts: Matt Hurley, Cory Jensen

Decision Date: 9/3/2019

### CAREGiver Inquiry

An individual looking for employment with Home Instead making contact through any channel. Channels include but are not limited to: Employment web forms and trackable calls generated from Partnerships, Search Marketing, Social Media, and Websites; Walk-in; Direct phone calls generated by TV, Radio, Print, Word of Mouth, etc.

Domain Expert: Molly Carpenter

*Decision Date: 1/18/2019*

### Applicant

An individual who has completed the uniform application

Domain Expert: Molly Carpenter

*Decision Date: 11/27/2019*

### Candidate

An individual who has completed the uniform application and is being considered for next steps in hiring process

Domain Expert: Molly Carpenter

*Decision Date: 4/30/2019*

### Pre-employment Screening

In US: Criminal Background Check, Drug Screen and Motor Vehicle Record Check

In Canada: Criminal Background Check and Driver's Abstract

Domain Expert: Data Governance Team

*Decision Date: 10/1/2019*

### Hired Employee

An individual is "hired" on the first day of orientation or training for which they are paid, after pre-employment screening has occurred. (Best practice is to pay for orientation/training, so assumption is they are paid).

Domain Expert: Molly Carpenter, Tanya Morrison

*Decision Date: 10/1/2019*

### Active CAREGiver

An individual is an Active CAREGiver when they are hired, have met Home Instead minimum requirements (all pre-employment screening and initial required training) and are eligible to work a shift

Domain Expert: Molly Carpenter

*Updated Date: 06/28/2019*

### CAREGiver Pending Work

A CAREGiver who is eligible to work a shift but has not yet served any client

Domain Expert: Molly Carpenter

*Decision Date: 10/1/2019*

### Terminated No Service CAREGiver

A CAREGiver who was active at some point but never worked a shift with a client before termination

Domain Expert: Molly Carpenter

*Decision Date: 1/22/2019*

### Working CAREGiver

A CAREGiver who has worked at least one shift with a client during a period

Domain Expert: Molly Carpenter

*Decision Date: 1/22/2019*

### Temporarily Deactivated CAREGiver

A CAREGiver that is temporarily not available to serve clients for 90 days or less. At 91 days, re-screening is required

Domain Expert: Molly Carpenter

*Decision Date: 10/1/2019*

### Terminated CAREGiver

A CAREGiver who voluntary or involuntary ends employment with Home Instead. Excludes Temporarily Deactivated CAREGivers

Domain Expert: Molly Carpenter

*Decision Date: 10/1/2019*

### Owner Inquiry

A person or persons that inquire about potential ownership in a Home Instead Senior Care franchise

Domain Expert: Kathleen McKay

*Decision Date: 6/25/2019*

### Prospect (Owner)

An owner inquiry that has been qualified to move through additional stages of the ownership vetting process by Franchise Development

Domain Expert: Kathleen McKay

*Decision Date: 11/27/2018*

### Owner

Someone who owns part or all of a Legal Entity doing business as Home Instead Senior Care

Domain Expert: Kathleen McKay

*Decision Date: 2/10/2020*

### Franchise

A Franchise is a business awarded to a Legal Entity, authorized to conduct business as Home Instead Senior Care within a given territory

Domain Expert: Kathleen McKay

*Decision Date: 2/10/2020*

### Legal Entity

The legal construct (trust, proprietorship, corporation, partnership or individual) that has been awarded a franchise and is doing business as Home Instead Senior Care

Domain Expert: Kathleen McKay, Tanya Morrison

*Decision Date: 2/10/2020*

### Exclusive Area

A defined geographic area awarded to a Legal Entity, which is described in Exhibit A of each franchise agreement; Also known as a "Territory"

Domain Expert: Tanya Morrison

*Decision Date: 2/10/2020*

### Office

The physical site(s) from which a franchise operates

Domain Expert: Data Governance Council

*Decision Date: 10/29/2019*

### Contact

An individual with a relationship to a Client or CAREGiver

Domain Expert: Matt Hurley, Cory Jensen

*Decision Date: 11/26/2019*

### Franchise Number

A unique internal identifier assigned to an Exclusive Area, often referred to as a "Franchise"

Domain Expert: Tanya Morrison

*Decision Date: 2/10/2020*

### Franchise Inception Date

Date of the first franchise agreement with a designated franchise number

Domain Expert: Tanya Morrison, Kathleen McKay      *Decision Date: 2/10/2020*

### Renewal Date

The date the current Franchise Agreement expires and by which a new franchise agreement must be entered into in order to continue operating as a Home Instead Senior Care franchise

Domain Expert: Tanya Morrison      *Decision Date: 2/10/2020*

### Franchise Setback Date

The date franchise development assigns to underperforming franchises that transfer ownership

Domain Expert: Tanya Morrison, Kathleen McKay      *Decision Date: 2/10/2020*

### Performance Standard

Minimum level of monthly Gross Sales OR Client Hours Served required for the Franchise to meet and maintain, based on the Age of the Franchised Business (Performance Standard)

Domain Expert: Tanya Morrison, Kathleen McKay      *Decision Date: 2/10/2020*

### Underperforming Franchise

A Franchise that is not meeting and maintaining the requirements of the Performance Standard

Domain Expert: Tanya Morrison      *Decision Date: 2/10/2020*

### Age of the Franchised Business (Performance Standard)

Length of time franchise has been in business for purposes of performance standards

- If original owner, calculated from Franchise Inception Date
- If acquiring an existing franchise, calculated from the Franchise Inception Date, including all previous ownership for that Franchise Number
- If acquiring an underperforming existing franchise, calculated based on the Franchise Setback Date assigned by the franchise development team and memorialized on the Franchise Agreement

Domain Expert: Tanya Morrison, Kathleen McKay      *Decision Date: 2/10/2020*



### Voluntary Split

Two Franchises with the same Owner(s) that are allowed to combine Gross Monthly Revenue and Client Hours Served in those two Franchises for purposes of the Performance Standard, awards and recognition

Domain Expert: Tanya Morrison, Kathleen McKay

*Decision Date: 2/21/2020*

### Senior Population (Performance Standard)

The # of seniors, aged 65 and older, residing within in the Exclusive Area as determined at the Franchise Agreement Date and maintained for the term of the Franchise Agreement

Domain Expert: Tanya Morrison, Kathleen McKay

*Decision Date: 2/21/2020*

### Franchise Owner Anniversary Date

The date the Franchise Owner entered the HISC network

Domain Expert: Tanya Morrison, Kathleen McKay

*Decision Date: 2/21/2020*

## Metrics:

### Conversion Rate (Service Inquiry)

# Care Consultations scheduled per period / # Service Inquiries per period

Domain Experts: Data Governance Team

*Decision Date: 1/18/2019*

### Close Rate

# New Clients per period / # of Care Consultations performed per period

Domain Experts: Data Governance Team

*Decision Date: 9/17/2019*

### Sales Rate

# New Clients per period / # Service Inquiries per period

Domain Experts: Data Governance Team

*Decision Date: 1/18/2019*

### Client Hours Served

Total hours of client service per period reported where billing amount was greater than 0

Domain Experts: Matt Hurley, Cory Jensen

*Decision Date: 6/28/2019*

### Average Hours per Client

Total Client hours served per period reported / Total Clients served per period reported

Domain Experts: Matt Hurley, Cory Jensen

*Decision Date: 1/18/2019*

### Client Service Rate

# Clients served per period / # Active Clients per period

Domain Experts: Matt Hurley, Cory Jensen

*Decision Date: 2/22/2019*

### Client Turnover Rate

# Clients deactivated during the period reported (excluding On Hold)/ # Clients active during the period reported

Domain Experts: Matt Hurley, Cory Jensen

*Decision Date: 3/6/2020*

### Client Tenure

The length of time from the date a service agreement is signed to deactivation date (or the date report was run for Active Clients)

Domain Experts: Matt Hurley, Cory Jensen

*Decision Date: 8/6/2019*

### Application Conversion Rate

# Employment Applications completed per period/ Number of CAREGiver Inquiries received per period

Domain Experts: Data Governance Team

*Decision Date: 1/18/2019*

### Hire Rate

# New CAREGivers per period/ # Applicants per period

Domain Experts: Matt Hurley, Cory Jensen

*Decision Date: 1/18/2019*

### Hours Utilization Rate

Total Service Hours Worked per week/ Total Active CAREGiver's Desired Hours per week

Domain Expert: Molly Carpenter

*Decision Date: 2/5/2019*

### CAREGiver Utilization Rate

# Working CAREGivers per period reported/ # Active CAREGivers per period reported

Domain Expert: Molly Carpenter

*Decision Date: 2/5/2019*

### CAREGiver Turnover Rate

# CAREGivers deactivated (excluding Leave of Absence) during a period / # CAREGivers scheduled during a period

Domain Expert: Cory Jensen

*Decision Date: 2/10/2020*

### CAREGiver Tenure

The length of time from date hired to the date of deactivation (or the report date for active CAREGivers)

Domain Expert: Molly Carpenter

*Decision Date: 8/4/2019*

### Inquiry to CAF Conversion (confidential application form)

# CAF's completed in a period/ total # Owner Inquiries in a period

Domain Expert: Kathleen McKay

*Decision Date: 6/25/2019*

### CAF to Owner Conversion (confidential application form)

# New owners in a period / # of CAF's completed in a period

Domain Expert: Kathleen McKay

*Decision Date: 6/25/2019*

### Inquiry to Owner Conversion

# New owners in a period / # of Owner Inquiries in a period

Domain Expert: Kathleen McKay

*Decision Date: 6/25/2019*