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Strategies for Achieving Sustainability of Home Healthcare Agencies

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Walden University

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Walden University

College of Management and Technology

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Robert J. Gagnon

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Walden University
2022

Abstract

Strategies for Achieving Sustainability of Home Healthcare Agencies

by

Robert J. Gagnon

MBA, Thomas College 2010

BS, Thomas College, 2007

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration – Healthcare Management

Walden University

March 2022

Abstract

Some organizational leaders of home healthcare agencies (HHA) experience financial pressures to sustain within the changing regulatory landscape. Organization healthcare leaders who develop sustainability strategies remain competitive and employ the community. Grounded in the balanced scorecard framework, the purpose of this descriptive, qualitative multiple case study was to identify strategies home healthcare agency (HHA) leaders used to maintain sustainability. The participants were five organizational leaders of three HHA and two home health industry consultants in the Northeast United States who implemented sustainability. Data collected came from semistructured interviews, archival records, and organizational documentation. Three themes emerged from the thematic analysis: enhance performance through data analytics management, diversify reimbursement, and develop effective recruitment and retention strategies. A key recommendation is for HHA leaders to promote bonuses, provide loan forgiveness programs, and develop performance improvement compensation strategies. The implications for social change include the potential for better patient outcomes and reduced rehospitalization rates for local hospital systems in communities.

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Dedication

I want to dedicate this research study to my wife, Kari Grant-Gagnon. If it were not for her patience, encouragement through the many hours spent pursuing a doctoral degree, and the motivation to be better, I would have never reached my goal. I also want to acknowledge my two boys, Landon and Parker, for inspiring me to continue pursuing higher education and become a role model to them in demonstrating the value of continued education as a lifelong practice. There were many times when I felt I would not be able to attain my goals; however, the positive support from my family, coworkers, and friends provided me with the reassurance it is possible, and I was able to reach the end of my journey.

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Section 1: Foundation of the Study

Home healthcare leaders experienced intensifying financial pressures to survive in an increasingly competitive market and changing healthcare regulatory landscape. Home healthcare organizations in the industry have decreased between 2013 and 2020 at a rate of 9% over a 5-year span (Centers for Medicare and Medicaid Services [CMS], MDCR Provider 1 2020). Given the potential consequences for patients to access quality care in the home setting, home healthcare leaders focused and provided a greater understanding of the strategies to achieve sustainability in communities to benefit the access of care to patient populations. As home healthcare agencies (HHA) understand their strategic vision as it pertains to their specific patient populations, this knowledge provided opportunities for HHA to develop and deliver value proposition strategies to strategic partners in creating innovative ways to maintain sustainability and, ultimately, enhanced patient care in their communities.

Background of the Problem

As organizational leaders of HHAs experienced financial pressures to maintain sustainability with the changing regulatory landscape, HHA leaders identified and implemented sustainability strategies. Over 4.9 million patients received care from HHA in 2018 (Centers for Disease Control and Prevention, 2018). Therefore, HHA leadership developed sustainability strategies that ensured patients receive high-quality care. As the healthcare environment changed and the home healthcare industry experienced consolidation, HHAs explored strategies to maintain sustainability. HHAs provided many services to their patients and focused on delivering quality care at a high level (Burns et

al., 2020). Therefore, HHAs demonstrated their value propositions for maintaining sustainability to their strategic partners to diversify their organizational strategy to maintain sustainability. Organizational leaders identified strategies to maintain sustainability and used predictive measures to evaluate various aspects of the organization, such as improving financial position, understanding statistical analysis, measuring performance indicators, and creating a strategic vision to address their future state. Accountable care organizations (ACOs) engaged in value-based reimbursement models to demonstrate the value specific to clinical measures to enhance performance (Hogle, 2019). Also illustrated by Hogle (2019), value-based reimbursement models provided opportunities to benefit a partnership between ACO and providers with the use of predictive analytics to target specific patient populations with data to achieve operational performance to demonstrate sustainability. The purpose of this study was to identify strategies HHA leaders implemented to maintain sustainability.

Problem Statement

To create a sustainable healthcare system, healthcare leaders need to address formidable challenges such as demand for innovative patient-centered models and technologies, increased costs to provide quality care, and fiscal pressures on reimbursements (Braithwaite et al., 2017). From 2013 through 2018, 1,142 HHA Medicare providers in the United States closed for business due to failure in sustainability (CMS, MDCR Provider 1 2020). The general business problem is that HHA faces challenges in assessing operational performance, which leads to failure in sustainability.

The specific business problem is that some HHA leaders lack strategies to maintain sustainability.

Purpose Statement

The purpose of this qualitative multiple case study was to identify strategies some HHA leaders used to maintain sustainability. The targeted population of this study comprised of five organizational leaders of three HHA and two home health industry consultants in the Northeast United States who have demonstrated success in implementing strategies to achieve their organizations' sustainability. The implications for positive social change included the potential to improve sustainability, promote organizational growth, and continue providing valuable services to local communities. Healthcare organizations in these local communities provided ongoing care for patients, particularly those receiving quality care in the homes. Identifying the value proposition for patient populations in our communities that influences positive social change enhanced the patient experience for communities and their patients. Patient populations benefited from receiving the superior quality of care from HHA while in their homes with their families; therefore, sustaining the services received by our patients in their communities was essential for the continuum of valuable patient care.

Nature of the Study

In this study, I used the qualitative research method to explore the strategies home health agency leaders used to maintain sustainability in the Northeast United States. Qualitative research was appropriate as it is used by researchers to gain an understanding of reasons and motivations to provide insights in obtaining specific information on

phenomena and behaviors to a specific target population (Park & Park, 2016). By contrast, Lewis et al. (2015) described quantitative research as a general way to examine data through variables' characteristics or relationships. As I did not focus on variables' characteristics or relationships, the quantitative method was not suitable for this study. Because the quantitative method was not appropriate for this study, the mixed-method approach was also not suitable.

I selected a qualitative multiple case study design to explore strategies HHA leaders used to achieve sustainability. Yin (2018) described the analytical value of using two (or more) cases as meaningful to the overall study, providing a more robust capability for identifying and comparing strategies for HHA to achieve sustainability. According to Craig et al. (2018), researchers understood each person's practical knowledge and documented their experiences to create results. Yin (2018) defined the narrative research design as an approach to interpreting or analyzing an event or sequence of events to describe participants' personal stories. Padilla-Diaz (2015) discussed the theory of phenomenological research as a design to study the meanings of participants' lived experiences. The narrative research design was inappropriate for this study because my goal was to explore organizations' strategies for achieving sustainability. The phenomenological design was unsuitable for this study, as phenomenological researchers focus on the personal meanings of the participants' lived experiences.

Research Question

What strategies do home healthcare agency leaders implement to maintain sustainability?

Interview Questions

1. What strategies do you use to maintain operational sustainability?
2. How does your organization assess sustainability strategies?
3. What indicators do you use to measure your ongoing organization's sustainability?
4. How do you use data analytics to assess outcomes and improve your operational efficiencies?
5. What were the key challenges with implementing the strategies for addressing sustainability?
6. How did you address the key challenges to implementing strategies for addressing sustainability?
7. What else can you share with me about your organizations' strategies for achieving sustainability?

Conceptual Framework

The conceptual framework for this qualitative multiple case study was the balanced scorecard. The balanced scorecard framework, developed by Kaplan and Norton (1992), was used to translate a company's vision and strategy into action steps, which, when implemented successfully, ensured sustainability. This theory's key perspectives are customers, finances, internal processes, and learning, and growth (Meena & Thakkar, 2014). I believed that I could use the balanced scorecard theory to facilitate developed key perspectives for HHA leaders to explore the characteristics to drive strategies for improving operational outcomes to achieve sustainability. According to Aibar-Guzman et

al. (2018), researchers stated how the balanced scorecard was more than a simple performance evaluation system, as it has become a strategic management tool to clarify and translate the mission and organizational strategy into actionable steps that leaders can communicate to their organization, board of directors, and communities. Home healthcare leaders use the balanced scorecard model to develop analytics to drive operational metrics for achieving sustainability. In this study, I used the balanced scorecard model to understand the strategies and processes the participating leaders used to drive improvement to achieve sustainability.

Operational Definitions

Balanced scorecard (BSC): The BSC was a method to measure performance in an organization while evaluating innovative strategies (Djakovic et al., 2020).

Business analytics: Business analytics refers to several techniques, such as descriptive and predictive, to extract data used to manage costs, measure quality outcomes, and improve patient satisfaction (Byrd & Wang, 2017).

Interoperability: Interoperability refers to how informatics accessed data between providers through a secure infrastructure for data sharing (Braunstein, 2018).

Key performance indicators (KPI): The key performance indicators were metrics derived from data analysis to measure performance levels and the value measured to a specific goal (Elhadjamor & Ghannouchi, 2019).

Operational sustainability: Operational sustainability refers to delivering cost-effective outcomes over time while comparing performance to organizational objectives (Braithwaite et al., 2017).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are those elements of a study a researcher assumed to be true without evidence (Halkier, 2013). The study's basic premise was that home healthcare leaders used a balanced scorecard model as a strategy and management tool in maintaining sustainability. I assumed that all HHA organizational leaders participated in a strategic planning process and implemented a balanced scorecard methodology to generate strategies to maintain sustainability. My final assumption was that all participants would provide an honest approach to the interviews.

Limitations

Limitations are elements of a study lacking the internal validity from analyzing the research (Brutes & Duniewicz, 2012). Home healthcare leaders had an extensive understanding of the strategic planning process to create a balanced scorecard methodology to drive decision making. However, because the interpretations and business practices change based on how the HHA runs its operations, the expertise was not the same across all organizations. Participants' expertise varied, affecting how HHAs maximized outcomes in the strategic planning process to develop balanced scorecards to achieve sustainability and enhanced the strategic planning practices. Because the participants of the study could withdraw at any time, the research did not reflect the effectiveness of the strategic planning process, the balanced scorecard utilization, and outcomes that influence the organization's sustainability.

Delimitations

Magilvy and Thomas (2011) explained how a study's delimitations distinguished the study's scope while identifying the researcher's choices compared to the limitations of the research. The exploration of the balanced scorecard model applied by home healthcare leadership was a delimitation to the study. The population was delimited to multiple HHA with at least 300 employees in the United States' Northeast region. Participants were delimited to two chief financial officers and one chief clinical officer who developed strategies to achieve and maintain sustainability.

Significance of the Study

Contribution to Effective Business Practice

Recognizing the strategic issues that support HHAs' sustainability provided specific means for HHA leaders to develop and implement derivative strategies and processes for improving business practices (Medicare Payment Advisory Commission, 2019). Medicare statistics provided HHA leaders with the incentive and means to identify and prioritized opportunities to improve their business and focus on patient needs to enhance care quality. HHA leaders could use the findings to support achieving sustainability for realizing their organizations' strategic vision by improving the efficiency and effectiveness of key business processes. Therefore, other HHA leaders adopted or adapted the necessary knowledge on sustainability strategies by utilizing better business practices and data analytics to improve their business' performance.

Contribution to Positive Social Change

My research findings and conclusions could provide leaders of HHAs strategies to maintain sustainability and continue to provide valuable, quality care to patients in their communities. The outcomes for this research also provided enhanced knowledge to home healthcare leadership on the value of strategic visioning and value proposition to catalyze derivative positive social change. Therefore, HHA leaders understood how to differentiate themselves as key stakeholders with patients by providing patient-centered care, enabling patients to receive quality care in their homes. HHA leaders could promote social change by allowing patients and their families to access high-quality health care at reduced costs.

A Review of the Professional and Academic Literature

This section is a review of the current literature contributing to strategies for sustainability in HHA. The purpose of this descriptive, qualitative multiple case study was to identify strategies HHA leaders used to maintain sustainability. Home health organizational leaders understand strategic vision while exploring how systems are implemented and provided insight into how these strategies achieved and supported sustainability.

In this academic literature review, I explored the framework approach used in the research topic and how it pertains to home health organizations' sustainability. The literature review provided an understanding of the need for the balanced scorecard theory in organizational leadership. In the literature review I identified and supported how the balanced scorecard theory supports the concept of sustainability.

I researched several academic databases for peer-reviewed articles through the Walden University Library: (a) Business Source Complete, (b) Emerald Management Journals, (c) ProQuest Central, (d) ProQuest, and (e) Academic Search Complete. The research of peer-reviewed articles primarily consisted of articles published within the last 5 years. My search generated approximately 151 references, with approximately 89% peer-reviewed and 88% published on or after 2016.

The key search words included combinations of *operational sustainability*, *business innovations*, *telehealth strategies*, *remote patient monitoring*, *business analytics*, *predictive analytics in healthcare*, *artificial intelligence*, *strategic planning*, *balanced scorecard theory*, *population health management*, *bundled payments*,) *value-based payments*, *corporate sustainability*, *critical success factors*, *social responsibility*, and) *interoperability*.

The Balanced Scorecard Theory and the 7s Framework

Leaders use the balanced scorecard theory to identify an organization's primary strategic objectives and described relationships through financial and nonfinancial metrics that contributed to achieving organizational strategies such as sustainability (Appolloni et al., 2019). Aibar et al. (2018) and Appolloni et al. (2019) revealed the balanced scorecard concept improves performance with organizational strategic objectives contributing to sustainability. My research study revolves around how organizational leaders used strategies to achieve and maintain sustainability; however, there was an alternative to the balanced scorecard method: the 7s framework.

McKinsey's 7s framework is an alternative performance management system guiding organizations in interpreting the vision and strategy into implementation (Shaqrah, 2018).

The Balanced Scorecard

Leaders translate the organization's mission and vision into a balanced scorecard; therefore, the organizational leaders demonstrate how the BSC provided purpose to measure performance through a set of actionable goals. The balanced scorecard theory is a performance management system guiding organizations in interpreting the vision and strategy into implementation (Meena & Thakkar, 2014). Christesen (2008) described the balanced scorecard theory as an excellent example of representing a theory in use and practice. A balanced scorecard provides a connection with the stakeholder and an organization's statistical analysis by expanding how to achieve sustainability by understanding how to measure indicators through a different lens using better data (Djakovic et al., 2020). The balanced scorecard methodology provides organizational leaders the tools to combine theoretical practice and measure indicators to manage data to achieve sustainability through the organization's mission and vision.

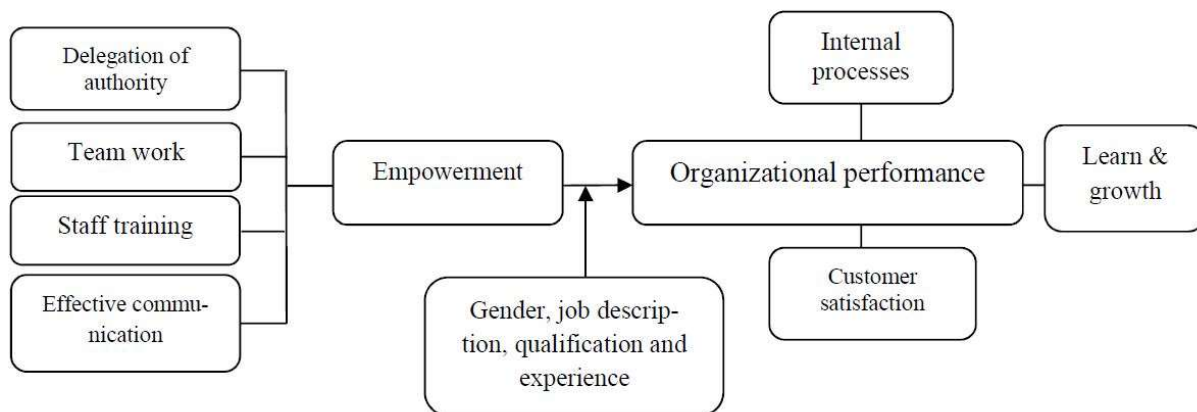
The concept of the balanced scorecard in the healthcare is best used to analyze performance and should be used to manage performance measurement indicators. The balanced scorecard provides leaders with management practices that enhance control and help organizations achieve their strategic objectives through assessment of healthcare performance to optimize efficiency and effectiveness (Craig et al., 2020). The value of the balanced scorecard has evolved into another version identified as the sustainability balanced scorecard concept and is organized in two ways: (a) data related to

sustainability incorporated in four elements of the scorecard; or (b) added as a fifth element to the balanced scorecard (Azmi et al., 2018). Azmi et al. (2018) revealed the evolution of the balanced scorecard to include sustainability as a valuable addition to the concept as it provides a more robust analysis around better integrating corporate sustainability measurement indicators into the management tool of the balanced scorecard. Sustainability management has proven to benefit organization performance to cope with how to manage sustainability; therefore, management tools are needed to analyze information for managers to make appropriate decisions timely using a balanced scorecard concept through the sustainability element (Chaker et al., 2017). According to Chaker et al. (2017), a constructed balanced scorecard provides an opportunity to prioritize key performance indicators with each element to provide leadership with an enhanced process to make decisions. According to Azmi et al. (2018), Chaker et al. (2017), and Craig et al. (2020) claimed the importance of operationalizing the balanced scorecard concept to provide organizational leaders with management tools to optimize strategic objectives while utilizing key performance indicators to make strategic decisions. The balanced scorecard provides a stronger alignment of organizational structure to strategic objectives ensuring all areas of organization are working towards the same strategic goals. Evaluating performance of an organizational structure is critical in creating continuous improvement to organization outcomes aligning to strategic objectives. Analyzing financial key performance indicators (KPIs) monthly is a strategy to monitor performance through dashboard management and linking strategic management to operational objectives (Guttler et al., 2021). Balogova et al. (2020)

described the importance of improving performance by analyzing trends while using strategic approaches to better adjust objectives of an organization. Indicators are often analyzed using measurable components to ensure effectiveness while establishing expectations to develop meaningful assessment of useful performance indicators (Leveque & Sutherland, 2020). Therefore, Leveque and Sutherland (2020) research demonstrated the value of using KPIs to provide a solid assessment of how organizational performance is measured through analysis when identifying a process to understand the elements of a balanced scorecard (see Figure 1).

Figure 1

Illustrating Elements of the Balanced Scorecard



Note. The Balanced Scorecard Concept as it illustrates the elements supporting the process. Adapted from “The role of empowerment in improving internal process, customer satisfaction, learning and growth,” by Aljawarneh et al., 2020, *Management Science Letters*, 10(1), p. 842 (<https://doi.org/10.5267//j.msl.2019.10.013>).

Establishing a framework to develop a balanced scorecard to evaluate performance provides organizational leaders the ability to establish metrics to best

understand the strategic approach to understand performance objectives. Performance measurement is a powerful tool to certify success of business strategies while establishing a balance between financial and nonfinancial metrics to link organizational strategic objectives to performance (Eldeeb et al., 2020). Given the research, Elbanna and Fatima (2020) discussed how performance measurement has limitations on analysis focusing on a single outcome; however, illustrated positive outcomes with an organization that addresses performance exclusively on financial outcomes. The balanced scorecard provides organizational leaders with the framework to develop performance measurement strategies and focus on all aspects of strategic business strategy including nonfinancial metric perspectives. Elbanna and Fatima (2020) and Eldeeb et al. (2020) focused on how organizations use performance measurement strategies partnered with the balanced scorecard approach to understand key metrics, including financial and nonfinancial metrics.

Leaders implement the balanced scorecard methodology to demonstrate a value proposition through measuring indicators to achieve strategic objectives and effectively manage operations. As a performance measurement tool, the balanced scorecard brought together financial and nonfinancial indicators to provide a balanced approach in measuring departments, individuals, and organizational performance (Gooneratne & Thananchayan, 2018). Gooneratne and Thananchayan (2018) reported that implementing a balanced scorecard led to success in a telecommunication company, because leaders accepted the balanced scorecard as it was incorporated in all aspects of the company from day-to-day operations to senior leadership levels. Leaders can use a balanced scorecard

model for many strategic objectives, including turbulent environments for organizations adapting to environmental conditions or other situations (Rabieh et al., 2019). Rabieh et al. (2019) used a dynamic sustainability balanced scorecard model to address economic and environmental situations in optimizing organizational performance through the analysis performed in the study. In Rabieh et al.'s (2019) study, the results indicated a significant relationship between policies and decisions being made by leaders leading to different scenarios in all aspects of the organization. A common model could not be adopted to measure performance in stable and changing environments; therefore, the findings provided a recommendation to develop an optimization model that focused on the impact of external factors affecting organizational performance as the concept is more essential when compared to policies and decisions made by leaders.

Operational performance is vital to achieve sustainability and the successful execution of a balanced scorecard into operations illustrates how organizations transform strategic vision into operational success. Measuring and evaluating performance assessments through a balanced scorecard model provides the support to accurately improve operating performance (Tuan, 2020). Tuan (2020) demonstrated how Vietnamese commercial banks transformed vision and strategy into short-term and long-term strategic objectives with specific goals to measure operational success through the reduction of expenses and the increase of revenues. Gooneratne and Thananchayan (2018), Rabieh et al. (2019), and Tuan (2020) revealed the value of a balanced scorecard and the impact on operational performance through (a) leaders' acceptance of a balanced scorecard in a telecommunications company, (b) the value of a balanced scorecard

through economic and environmental conditions affecting operational performance, and (c) the transformation of vision and strategy into strategic objects supporting operational performance in commercial banking industry. Transforming organizational strategic goals into operational strategies creates a value proposition for organizational leaders to demonstrate the importance of implementing a balanced scorecard model and measure indicators to achieve sustainability.

Organizations demonstrating corporate social responsibility (CSR) as a major aspect of strategy and business practice could achieve sustainability through performance management methodology using the balanced scorecard method. Asiaei and Bontis (2019) described the value of CSR as an organizational strategy to integrate into operational analysis the support to sustainable economic and social objectives. As organizational leaders develop their strategic framework to understand all aspects of business practice, leaders focus on the strategies to achieve the vision, mission, and values of the organization; therefore, organizational leaders develop balanced scorecards to analyze and trend operations through measurement models. Dwinanda et al. (2020) illustrated how the use of a BSC with critical success factors is a powerful model to align strategic business objectives with operational performance goals; therefore, the objectives focused on references in operational analysis to develop strategies supporting the balanced scorecard. The balance scorecard addresses a level of complexity with the analysis of KPIs and focuses on a few metrics to demonstrate strategic and operational progress. Based on the research of Guillem et al. (2020), the balanced scorecard methodology provides enough statistical significance to reach assumptions on practical

business objectives. Given the research by Guillem et al. (2020), organizations providing a framework to measure performance achieve better performance and have stronger opportunity to maintain sustainability (Balogova et al., 2020). The analysis of KPIs to support a balanced scorecard model provides leaders the framework to translate business practice into successful operational performance indicators to demonstrate strategic objectives progress and ultimately achieve sustainability.

Understanding performance measurement is critical to how leaders transform strategic vision into operational goals through assessing indicators used to measure operational performance. The use of the balanced scorecard concept to address strategic management issues creates value to organizations in assessing performance by financial and nonfinancial indicators (Cabinova et al., 2019). The results demonstrated by Cabinova et al. (2019) focused on factors influencing the use of a balanced scorecard: (a) change management, (b) mission and vision, (c) strategic planning, and (d) benchmarking. These factors ensure profitability while increasing an organizations value through understanding how to measure indicators to address long-term strategic objectives. According to Frederico et al. (2020), performance measurement in supply chains demonstrated strong alignment with the elements of the balanced scorecard concept: (a) finances, (b) customers, (c) business processes, and (d) learning and growth as another form of addressing strategic management issues through measuring performance, other than financial indicators. Cabinova et al. (2019) and Frederico et al. (2020) found the balanced scorecard performance measurement methodology provides a strategic vision and strategy and explores the interconnections influencing operational

performance in a specific business or industry. Through performance tool analysis, leaders measure indicators influencing key factors of a balanced scorecard while focusing on strategic management opportunities that explore how operational performance is achieved.

Implementing a balanced scorecard theory can translate strategies into attainable, measurable goals. Aibar et al. (2018) explained how by identifying the importance of the strategic management tool, it became possible to improve the communication process, become strategically aligned with the plan, and begin organizational learning. Implementing a balanced scorecard theory could improve workforce understanding of the design, increase the number of time executives spend on talking about strategy, and link budgets to the method. Aibar et al. 's findings focused on how the balanced scorecard theory links numerous layers of executive responsibility to a simple performance measurement, which also illustrates the importance of understanding the strategic planning process and how a balanced scorecard can provide an opportunity to measure the success of strategic goals. Improving operational strategies through the use of a balanced scorecard as a planning tool for executives to link to a variety of responsibilities is an important aspect to the value proposition of an organizations use of the balanced scorecard theory.

In summary, the purpose of the balanced scorecard theory is to help organizational leaders measure performance through actionable goals. Implementing changes based on the balanced scorecard enhance controls and helps organizational leaders achieve strategic objectives (Craig et al., 2020). Leaders can bring together

financial and nonfinancial indicators to provide a balanced approach in measuring performance throughout the organization (Gooneratne & Thananchayan, 2018).

Therefore, implementing a balanced scorecard theory can translate strategies into attainable, measurable goals. McKinsey's 7s framework is an alternative performance management system guiding organizations in interpreting the vision and strategy into implementation (Shaqrah, 2018). The balanced scorecard methodology provides organizational leaders with the knowledge to connect strategic vision, business practices, and operational performance by measuring to KPIs, however, McKinsey's 7s framework is another performance management tool often compared to the balanced scorecard methodology.

McKinsey's 7s Framework

Performance measurement tools provide leaders the opportunity to develop a plan on how to measure the operational performance of an organization. The McKinsey 7s framework is an alternative performance management system guiding organizational leaders in implementing their vision and strategy based on a management model developed by top consultants working for McKinsey's corporate headquarters (Shaqrah, 2018). The McKinsey 7s framework envisioned a model with seven factors: (a) strategy, (b) systems, (c) skills, (d) style, (e) staff, (f) structure, and (g) shared values (Indradewa et al., 2019). The objective of McKinsey's 7s framework, according to Shaqrah (2018), is to demonstrate how the seven components are used with business intelligence systems to operationalize data with analytical tools to focus information for decision makers. To execute effective organizational change, according to McKinsey's 7s framework, leaders

must focus on the seven goals to identify how organizational change can provide an alternative to other performance management systems.

Leaders focus on what is necessary to achieve operational performance, however, leaders must understand how to develop strategies to support their strategic vision to align with organizational core competencies. According to Indradewa et al. (2019), shared values are the central core of the 7s framework as it aligns directly with the core values. Demir and Kocaoglu (2019) conducted a study exploring how the 7s framework fit in a digital transformation to understand how leaders used the model to determine how shared values benefit organizational performance. Intradewa et al. (2019) focused on how McKinsey's 7s framework illustrated the core values of a company's culture and how employees demonstrate performance through integration of the shared values. Measuring success requires company leaders to recognize and analyze their internal and external environments; therefore, understanding the value the source of their competitive advantage when determining their business strategies. Demir and Kocaoglu (2019), Indradewa et al. (2019), and Shaqrah (2018) found value in the 7s framework to understand an organization's shared values and vision and implement strategies to achieve sustainability through operational analysis. Successful implementation of how core values support an organization's culture influences the operational performance through an organizations value proposition to demonstrate how to determine business strategies to achieve sustainability.

The 7s framework and the balanced scorecard concepts both focus on the theoretical approach to understanding an organization's internal and external environment

to measure success through aligning to an organization's strategic plan or shared values. Through research, Kaplan (2005) claimed that the 7s framework and balanced scorecard theory have features in common, such as (a) effective implementation of strategies through a multi-step approach, and (b) both address interconnectedness. Therefore, the balanced scorecard theory and the 7s framework approach align remarkably well, which strengthens the definition of a framework that focuses on the strategic purpose of an organization's mission and vision (see Table 1).

Table 1

Comparing the 7s Model and the Balanced Scorecard

<u>7-S Model</u>	<u>Balanced Scorecard (BSC)</u>
Strategy	Describes and measures the strategy, including balance between short-run cost savings and long-term revenue growth, the customer outcomes expected from a successful strategy, the customer value proposition at the heart of the strategy, and the critical internal processes that create and deliver the differentiated customer value proposition
Structure	Applying BSCs to diverse, decentralized units allows alignment across these units and to the corporate value proposition that enables synergies to be created, along with accountability for contributing to local and global performance
Systems	Organizations use the BSC to design their communication, reporting and evaluation systems for their unique strategy. Also, the BSC allows organizational systems such as incentive and reward, planning, budgeting, and resource allocation to be focused and aligned on successful strategy implementation
Staff	The BSC's learning and growth perspective identifies the critical job families that have the greatest impact on the strategy, and establishes measures for the knowledge, skills and experience of staff performing the most strategic internal processes
Skills	The BSC's internal process perspective measures the organizational skills, competencies, and processes that are most critical for the strategy to be effectively executed.
Style Culture	The BSC provides the agenda for leadership meetings, and keeps executives focused on the most important tasks for strategy implementation. Specific measures in the organizational capital component of the learning and growth perspective enable an organization to specify and measure the leadership style and skills it desires

Shared Values	Communicating the BSC throughout the organization creates shared understanding and commitment about the organization's long-term objectives and its strategy for achieving them. Adherence to values and cultural norms can be measured within the learning and growth's organizational capital component
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Note. Evaluation of the Balanced Scorecard Concept as it compares similarities to

McKinsey's 7s Model. Adapted from "How the balanced scorecard complements the

McKinsey 7-S model," by Robert Kaplan, 2005, *Strategy & Leadership*, 33(3), p. 44

(<https://doi.org/10.1108/10878570510594442>).

Identifying a performance management tool for organizational leaders to be successful in executing strategies and manage operational performance is vital to achieving sustainability and meeting strategic goals for home healthcare organizations. Kaplan (2005) discussed how both models help leaders align their organizations to execute strategy, however, the balanced scorecard model provides more advantages for leaders to be successful with meeting strategic goals, such as (a) development of custom reporting and performance management systems, (b) focus on measures specifically focusing on strategic objectives, and (c) influences managers to align planning, budgeting, and other systems to organizational strategies. According to Demartini and Trucco (2017), the impact of improved processes through analyzing performance management systems to strategic objectives is important to the success of organizations in the healthcare environment. Therefore, Kaplan (2005) and Demartini and Trucco (2017) provided strong examples of implementing a balanced scorecard to support the conceptual framework of my doctor research.

Achieving Sustainability

Leaders should explore all strategies within an organization, primarily in the home healthcare industry, where organizations are experiencing sustainability constraints affecting operational performance. The concept of sustainability is continually evolving to ensure organizational resources are preserved from the social and economic perspectives in aspects such as (a) the well-being of patients, (b) healthcare employees, and (c) our communities (Calabro et al., 2020). Organizational leaders must understand the concept of sustainability and how rising demands and competitions for resources drive sustainability-related to implement initiatives to support long-term impact such as the effects of leadership changes, innovative ways to manage population health, and diversifying reimbursement. As the healthcare climate changes and the demand on prioritizing resources continues, leaders develop specific approaches to understanding sustainability models as they establish indicators to help them monitor operational performance and influence sustainability (Bell et al., 2017).

Sustainability provides organizations with the opportunity to develop strategies to drive new ways to achieve their sustainability goals and explore the factors contributing to sustainability, such as lean management, growing costs of operations, stricter regulations and legislature, increased competition, patient and employee satisfaction, continuous improvement, social responsibility strategy, and brand recognition. Delisle (2019) illustrated eight issues from his research: alignment with leadership, pricing and risk adjustments, organizational structure, financial management, information systems, care transitions, evidence-based medicine, and supply cost management. Based on the

research supporting the business problem of HHA leaders lacking strategies to maintain sustainability, the topics addressed in the literature review are (a) corporate sustainability, (b) operational performance, and (c) business analytics and technology.

Corporate Sustainability

Organizational leaders are expected to exhibit a level of responsibility to understand the landscape of management strategies especially around sustainability models, therefore, leaders acknowledge the importance of growth strategies and financial performance but recognize the value of corporate culture and strategic planning as additional drivers to achieving sustainability. Corporate culture plays a meaningful role in an organization's goal to achieve sustainability, however, culture can demonstrate an organization's competitive advantage over other organizations affecting overall operations (Lees & Sadri, 2001). Leaders should understand the value proposition of an organization to manage toward corporate sustainability and ultimately improving the overall culture of an organization, however, it is imperative to foster a positive culture as a strategy to demonstrate sustainability. Muff (2021) described that when an organization becomes more sustainable, the operational priorities connected with the value proposition of an organization provides leaders the opportunity to embrace change and manage risks to best manage the organization's strategic vision. Leaders manage successful operations through strategies to achieve sustainability demonstrate the value of organizational culture.

Corporate sustainability provides leaders with strategies to deliver on successful business practices, monitor social and environmental risks, and address social

responsibility affecting corporate culture. Lee (2020) described how the retail industry adapted to corporate sustainability strategies to promote stronger business practice while also focused efforts on social and environmental concerns. Organizational leaders must focus on social responsibility as a strategy to enhance corporate culture as the factors – internally and externally – can transform a positive culture into a negative reputation quickly; ultimately affecting an organizations overall culture. Social responsibility enables organizations to develop a long-term strategic objective on how to manage competitive advantage while identifying the external factors to support the value of social expectations affecting corporate culture (Liang & Yu, 2020). An organization’s strategic corporate social responsibility provides opportunities to establish initiatives to strengthen the value proposition through corporate reputation and social responsibility, therefore, illustrates how organization can demonstrate significant positive impact to our communities while achieving sustainability.

Organizational leaders establish the value in corporate sustainability strategies and focus on determinants affecting operational performance. Management can develop corporate sustainability through decision making strategies to identify sustainability metrics to analyze organizational success (Andronie et al., 2020). Development of nonfinancial KPIs fortify the value of how metrics provide an understanding to economic and social determinants affecting the overall performance of an organization. Muff (2021) described how organizations with strong cultures of sustainability ensure the healthy corporate environment while improving the lives of patients and ultimately, operate successfully for the long-term. Organizational leaders must strive to improve

corporate cultures and social responsibility strategies in unison with performance measurement strategies to validate the value proposition and ensure corporate sustainability.

Corporate sustainability provides organizational leaders with strategies to understand the internal and external forces affecting operational success outside of the financial performance, however, understanding the direct effect of an organization's competitive advantage is vital to achieving sustainability. Abusalem (2021) described the importance of strategic agility to manage the environmental shifts in landscape including the rapid change in regulatory design affecting corporate sustainability for the healthcare industry. Leaders identified the factors driving corporate sustainability and be agile in development of strategies to address concerns or risks affecting the sustainability model to attain the strategic objectives of an organization. Management of an organization develop strategic goals and align with the organization's opportunities and threats to outline a strategic plan (Siagian & Tarigan, 2021). Understanding the environmental landscape and what steps must be implemented to strategically align with corporate sustainability strategies is essential to healthcare organization addressing the risk to the operational performance.

The strategic planning concept and sustainability models developed by organizational leaders demonstrate strategic partnership in alignment with the strategic objectives of an organization striving towards achieving sustainability. Hospitals and healthcare organizations operate near to full capacity, therefore, as COVID-19 fragmented organization's care delivery systems, it became critical to understand and

plan for the increased demand in healthcare. Abir et al. (2021) described how healthcare delivery design with a social responsibility framework demonstrated value as a strategic objective in optimizing population health strategies to align organizational strategic planning with managing operational performance goals. The research from Abir et al. (2021) suggested the importance of aligning corporate sustainability objectives through strategic planning to prepare for how to achieve sustainability through operational excellence.

Operational Performance

Understanding the operational and fiscal challenges facing the home healthcare industry for leaders is imperative to address strategies to achieve sustainability. Leaders in hospitals must address operational and fiscal challenges under the Patient Protection and Affordable Care Act (PPACA) of 2010 (Lynch, 2016). The law provided access to healthcare to millions of Americans; however, while the access to healthcare was increasing, the professions of key clinical positions within healthcare such as nurses are expected to have shortages (Lynch, 2016). From the PPACA policy implementation in 2010, multiple factors such as (a) aging, (b) population growth, and (c) a greater insured population since PPACA, have created barriers in the availability of physicians and other clinical professions to meet the needs of patients in the healthcare delivery system in the United States (Lin et al., 2020). Lin et al.'s (2020) findings illustrate the shortages of over 91,000 physicians and medical specialists in 2020, which will not meet the demand for services. Sustainability designs are useful for HHA to identify strategies to illustrate innovative ways to retain valuable clinical staff in an industry where all healthcare

companies are fighting for the same applicants and see more patients due to the increase in access to healthcare (Driscoll & Pennington, 2019). Lynch described this problem in 2016, and it will affect the home healthcare industry as we have shortages in multiple clinical professions. The development of strategic vision by leaders is vital to focus on operational performance and align strategic objectives with strategies to achieve sustainability.

Nonprofit organizations have many complex operations while following their mission; they also face the changing regulatory environment, especially with the challenge of retaining clinical professionals to manage patient populations. Driscoll and Pennington (2019) described maintaining or recruiting nurses as a strategy to address organizational impact in various areas such as staff morale, agency budgets, relationships with strategic partners, and patient care. Cohen and Kleber (2020) described how retaining nurses allows organizations to manage environmental and health risks throughout the care continuum. Sustainability refers to how a clinical program maintains a level of profitability through addressing resource allocation or implementation strategy that benefits an organization performance (Linwood-Amor et al., 2020). Measuring sustainability is a complex task illustrating many healthcare organizations' challenges (AlJaberi et al., 2020). Healthcare professionals manage waste through medical equipment and products from their patient care that could affect sustainability in the healthcare setting (Cohen & Kleber, 2020). HHA leaders need to understand how to manage their costs related to direct care to maximize profitability and maintain sustainability.

Leaders have the opportunity to engage successful business practices to effectively influence sustainability goals in healthcare industry by focusing on management tools to improve operational performance. Business schools could provide a role in how companies can successfully compete and collaborate in the industry while engaging in sustainable practices by educating their business students on the importance of sustainability in the business world with a focus on management tools, including (a) strategic planning and (b) key performance indicators to drive operational performance (Buono et al., 2015). The concept of sustainability provides organizations with the opportunity to develop strategies to drive new ways to achieve their sustainability goals and explore the factors contributing to sustainability, such as (a) lean management, (b) growing costs of operations, (c) stricter regulations and legislature, (d) increased competition, (e) patient and employee satisfaction, (f) continuous improvement, (g) social responsibility strategy, and (h) brand recognition (Buono et al., 2015). Providers focus operations on demonstrating value to achieve their overall goals (Porter & Lee, 2013).

Leadership strategies utilizing innovative, quality services can help reduce readmission rates to maximize profitability and ultimately maintain sustainability to all patients' localities. Hospital programs contribute significantly to reductions in readmission rates and reimbursement penalties (Atav & Summers, 2020). Atav and Summers (2020) demonstrated clear strategies to support sustainability: (a) utilizing home health agency services, (b) developing telehealth strategies, and (c) implementing a robust case management process. Additionally, Atav and Summer (2020) focused on implementing these strategies to create opportunities to maintain sustainability with the

hospital programs, therefore, providing a valuable case study on how to connect strategies to increase sustainability potentially. Burnhard et al. (2013) described how healthcare are perceived in urban and rural communities and identify environmental health priorities affecting the underserved populations. Atav and Summer (2020) and Burnhard et al. (2013) described how the design of identifying areas of focus and creating innovative strategies meet an organizational objective, like reducing readmission rates and reimbursement penalties; is necessary to the understanding of how strategic partners can utilize home health agencies and telehealth services to drive performance. Therefore, focusing on key performance indicators specific to reducing readmission rates and how home health agencies can provide value to hospital systems could reduce the overall spend on patients and achieve the concept of sustainability.

Strategic objectives demonstrating the value proposition provides leaders the opportunity to effectively align strategic goals with operational performance establishing improved outcomes for patient populations and enhance corporate culture. Leadership strategies provide value to how organizations take care of patients, and how integrated teamwork to achieve a shared goal will drive superior outcomes for their patient populations (Ho & Pinney, 2016). Leadership could influence how organizational leaders can drive their patients' quality of care (Fan, 2020). Brumpton and Chan (2020) described how healthcare systems effectively operated through a pandemic when confidence is high in the treatment and services they provide. Leadership is essential to the quality of care delivered to patients, and organizations need to understand how to engage staff to

implement leadership strategies to drive outcomes while enhancing the organizational culture.

Improvement of corporate culture provides leadership with opportunities to focus on what is important to staff and patients. Leadership's role strengthens an organization's culture, increases staff engagement, and increases patient engagement (Fan, 2020). The value of implementing a lean-leadership model into a healthcare organization to improve the quality of care to patient populations, increase efficiencies, and reduce the cost of patient care, therefore, illustrating the importance of applying lean strategies in the healthcare industry while emphasizing developing people and creating a continuous improvement culture (Backstrom et al., 2020). Fan (2020) and Backstrom et al. (2020) focused on how to address the importance of a patient's quality of care in enhancing the clinical outcomes that ultimately drive organizations to achieve sustainability.

Performance measurement systems improve care to patients while enhancing patients' quality while also analyzing trends to improve healthcare organizations' performance measures with the strategic use of performance measurement systems and improved processes of care (Demartini & Trucco, 2017). Levesque and Sutherland (2020) conducted 19 studies on performance frameworks, which used a goal-achievement approach to analyze healthcare system concepts to identify performance, therefore illustrating a comprehensive assessment of which ideas provide the best method for performance management to enhance a healthcare organization's process while focusing on clinical outcomes measured to maintain sustainability through the use of a balanced scorecard.

The development of policies and procedures having a designated compliance officer, a developed compliance communication plan, internal auditing, monitoring, and continued training and education around critical aspects of compliance management are important strategies to enhance organizational strategies to mitigate risk and improve compliance around patient populations. The importance of improved efficiency and effectiveness of the Health Insurance Portability and Accountability Act (HIPAA) through organizational compliance and training (Agris & Spandorfer, 2016). Bodenger and Steiner (2017) discussed the necessity of developing, implementing, and continually evaluating a compliance and ethics program as a useful management tool. Agris and Spandorfer (2016) focused their efforts on how the appropriate training and compliance programs could reduce the risk of HIPAA breaches while implementing training programs to address the requirements to audit these regulations. The ethical issues and professional values of case management professionals in the healthcare industry as case management has targeted community-based care that include (a) medical assessments, (b) care planning, and (c) care coordination to enhance the lives of their patient populations and communities they serve (Corvol et al., 2016). An effective compliance program in an organization addressing patient population needs first illustrates the strategic vision of leaders to demonstrate the value through enhanced compliance objectives to mitigate risk as a management tool.

Population health strategies allow organizational leaders to focus on patient populations using data analytics to manage performance. Collaboration among multiple organizations and providers allows for more substantial patient care in the services

continuum in providing data to help the organizations provide care to patient populations (Duncen, 2019). Population health management initiatives created strategies to improve the quality of care while also addressing the cost control structure to drive operations to maintain sustainability (Baan et al., 2019). Organizations use population health management strategies to improve care quality while reducing organizational costs (Steenkamer, 2019). The value of community nurses to local patient populations with extensive knowledge in patient-centered care, and how population health management concepts, including data analytics; help provide more comprehensive services to local communities (Duncen, 2019). An analytical tool called 'Primary Sense' used by Gold Coast Primary Health Network to pull data and runs it through algorithms to evaluate the risk levels from a clinical perspective producing reports of patients who would benefit from specific services (Davies, 2020). Managing population health strategies with the use of data analytics strengthens the quality of care provided to patient populations through the analysis of cost control structure and enhancing the comprehensive services to communities through the understanding of risk levels affecting patients.

Social determinants are an area of focus that drives operational performance as a factor of quality measures in patient satisfaction. Organizational leaders developed strategies around population health management to address an opioid crisis while focusing on illustrating the statistical analysis around a challenge that faced the organization in prescribing opioid doses to patients (Homsted et al., 2017). Social determinants of healthcare help to identify population health outcomes and how the focus on social determinants helped healthcare professionals focus on the individuals while

optimizing the effects of identifying outcomes to provide curative services for the individual's illness (Glauber, 2020). A driver to how an organization provides full service to their patient populations in understanding the social determinants of care while providing organizations an opportunity to maintain sustainability. Burns et al. (2020) described the importance of high-quality care delivered to patients receiving health care services while understanding the quality measures critical to driving performance, and most importantly, outcomes to their patients. As the payment models are evolving and including more value-based concepts to have risk arrangements, there are also changes in how patients manage through population health management tools are cared for. The capabilities of electronic health records, an increase in the usage of artificial intelligence, including enhanced data analytics, and the growing understanding of interoperability. The value home health providers play in the episodic payment system about providing quality care within a structured payment model especially innovations to improve clinical outcomes with bundled payments is essential to maintaining sustainability (Lee & Schiller, 2017). As HHAs understand their quality measures about specific patient populations, this understanding provides opportunities for these organizations to develop and deliver their value proposition to strategic partners in creating innovative payment models to drive operational performance and, ultimately, enhanced patient care in their communities.

Leaders must focus on reimbursement strategies to achieve sustainability through diversification and an enhanced understanding on how value-based arrangements enhance performance. Accountable Care Organizations (ACOs) adopted value-based

payment arrangements rewarding for attaining specific quality goals; therefore, penalized if no improvements (Hogle, 2019). The healthcare reimbursement system's overall landscape as the shift in reimbursement systems drives parity between payers and providers, especially with Medicare utilizing research to demonstrate value through scenarios (Delisle, 2019). The various payment models (traditional fee for service, bundled payments, and bundled payment pilots) drive the landscape as it changes; however, with these changes comes challenges (Delisle, 2019). In a qualitative study on how ACOs manage value-based population health management through a variety of payment arrangements, Hogle (2019) discussed the value of how data collection focusing on creating new metrics to statistically gather information to track measures as it pertains to population health areas where metrics for incentives are measured. Targeting high utilizers or specific patient populations creates a value proposition for providers as they have expertise in areas to maximize the clinical outcomes to drive sustainability (Hogle, 2019).

Pay for performance is one indicator of how organizational leaders can reward clinical employees for the excellent work that demonstrates the value proposition toward positive performance through critical indicators. Capitated and fee-for-service payment models are other methods that provide value to the healthcare industry in driving data to drive analysis around the payer and its effects; therefore, providing an analysis utilizing variables and modeling to illustrate the minimization of their net cost (Koenecke, 2019). Value-based outcomes and reimbursement are analyzed and discussed in the healthcare sector about policy creation and focus on the relationship of personalized healthcare to

the outcomes of value-based reimbursement through statistical analysis (Garrison & Towse, 2017). Struiji (2015) described how the Netherlands had adopted the concept of bundled payments to their providers rather than the traditional prospective payment system that is currently in place to provide a specific cost to providers for their patients' care. According to Struiji (2015) the focus of how the Netherlands utilized a bundled payment system for diabetes care to include this innovative payment model created successful outcomes for providers. Through the many successes expressed in the research such as (a) a drop in patient mortality rates and (b) a reduction in overall cost, an innovative approach to providing care while partnering to optimize payment based on clinical outcomes. The concept of performance pay worked in the United Kingdom healthcare sector while analyzing the value of payment for performance initiatives within healthcare, therefore addressing issues dealing with patient-centered care and potential gaming opportunities to increase incentives (Sonsale, 2020). However, Sonsale (2020) illustrated how pay for performance improved outcomes, especially around clinical care and hospital admission rates. Garrison and Towse (2017; Sonsale (2020); and Struiji (2015) addressed areas around value-based care and how a home healthcare organization can utilize this to drive outcomes and sustainability. Therefore, the payment models illustrated above demonstrate the similarities in the research providing how value-based outcomes and reimbursement models generate strategies that optimize how providers achieve and maintain sustainability.

HHA leaders address operational performance through a variety of strategies such as (a) identifying value-based outcomes through enhanced reimbursement models, (b)

focusing on retaining key clinical professionals to address the increase of access to healthcare for patient populations, (c) demonstrating the value of cost reduction, and (d) maximizing outcomes through utilization of performance management systems.

Healthcare leaders focused efforts on fixing operations by identifying areas of risk, address regulatory changes, and modern operations by implementing management tools to maintain sustainability (Porter & Lee, 2013). The evolution of measuring and reporting healthcare systems' performance and how organizations have used performance models to assess, reflect, and report healthcare organizations' performance is important while addressing how organizations maintain sustainability (Levesque & Sutherland, 2020). As developing strategies to focus on operational performance is important to maintaining sustainability, it is also important to understand the management tools to achieve sustainability such as: business analytics and technology.

Business Analytics and Technology

HHA leaders must recognize and implement specific strategies to identify models' organizations need to achieve success through growth initiatives, such as (a) understanding the HHA's market analysis, (b) the competitive examination in a market, and (c) the business analytics as a driver of performance as all these components illustrate a value proposition to their customers, strategic partners, and payers. Yin (2018) described that the desired presentation should enable a reader of the case study to reach judgment regarding the merits of the findings; therefore, the evidence should be presented neutrally, with both supporting and challenging data. The concept illustrated above relates to business development by utilizing tools to comprehend market analysis

and business analytics that would drive performance. HHA leaders must create specific strategies to build sustainable models to guide their agencies to success, for instance, providing technological innovations such as Telehealth services. Telehealth strategies are critical to home health agencies' research as leaders create sustainability within the industry as reimbursement changes affect home health agencies' financial stability across the United States. The benefits of telehealth in the home healthcare industry are critical to the overall sustainability of an HHA. Therefore, organizational leaders' strategies are essential to driving financial performance while providing vital patient care through technology. The concept of building sustainable, effective telehealth programs within HHA will offer an organizational strategy that will support the operational performance and increase the quality of care for patient populations.

Interoperability is the ability of software to effectively exchange and make use of information, therefore, providing HHA with the capacity to exchange information through computer systems with hospitals to enhance patient care. Implementing this strategy for HHA to adapt and modernize their clinical workflows is valuable in creating a better communication plan with both internal and external stakeholders. Improvements in technology, information sharing, transportation, and communication provided organizations with an opportunity to explore how to implement a business development initiative strategically (Garman et al., 2019). Health care is in the age of interoperability, and it is important to communicate with Physicians as chronic disease management has become more difficult due to many different Physicians providing care (Braunstein, 2018). The author focused on the concept of interoperability in this modern day of

healthcare services as an innovation movement to connect referral sources instantly with crucial information for patient care. While identifying the percentage of patients with multiple chronic diseases responsible for a large portion of Medicare spending in the United States (Braunstein, 2018) illustrated the importance of interoperability to the continuum of care to reduce these patients' overall spending with multiple chronic diseases. Garman et al. (2019) and Braunstein (2018) provided similar research on how health care professionals are conducting research to attain the essential information for organizational leaders to implement strategies to achieve sustainability using dashboard analysis by use of interoperability. The use of technology and information sharing to understand interoperability is vital for organizational leaders to demonstrate the value proposition to strategic partners in managing the care of patient populations.

Business analytics can provide healthy decision-making in a healthcare environment about demonstrating value to patient populations or specific chronic illnesses. Veteran's Affairs (VA) department created a vision to transform the VA system using strategic analytics to drive improvements, learning, and performance (Love, 2019). The VA found a way to support clinicians in meaningful ways that result in improved outcomes as this has been the outcome the VA has been pursuing to deliver excellent healthcare (Love, 2019). Chroneos-Krasavac and Karamata (2020) described the value of business analytics and how the use of statistical analysis helps to provide individuals value information to drive operations. Cavalcanti and Leite da Silva (2020) described the value of business analytics within the airline industry's revenue management context focused on how the data and tools provide an analytical approach to understanding how

the airline industry operates. Business analytics is viewed in three different perspectives including: (a) the descriptive perspective, (b) the predictive perspective, and (c) the prescriptive perspectives with perspectives to focus on the decision-making process by combining how people, processes, and technology analyze data (Byrd & Wang, 2017). Chronos-Krasavac and Karamata (2020) illustrated the current state of business analytics and how the development increased the focus on the concept of business analytics along with its value proposition utilizing predictive analytics and driving the future of statistical analysis and trending. One commercial insurer utilized predictive analytics to improve resource allocation while creating a workflow to close the potential gaps in care to focus on statistics that illustrated the percentages of populations related to healthcare spending (David et al., 2019). Byrd and Wang (2017); Chronos-Krasavac and Karamata (2020); David et al. (2019); Love (2019) demonstrated an understanding in how to maximize opportunities utilizing business analytics to maintain sustainability while also using the balanced scorecard method. Business analytics provides leaders of HHA the data to identify areas to improve operational performance through predictive analytics and statistical trending. The research suggests the value in business analytics to develop strategies to improve workflows to address gaps in care which would focus on the statistical assessment of the data presented to organizational leaders.

Artificial intelligence (AI) would create more efficiencies and allow time for medical professionals to provide human quality care to patients while demonstrating fundamental values to medical care. AI could allow medical providers to focus on patient-centered care while achieving sustainability (Kerasidou, 2020). The concept of

(AI) within a healthcare organization about clinical and non-clinical sections of an organization is another strategy to address sustainability using business analytics through the balanced scorecard method (Blass & Porr, 2019). Also, Blass and Porr (2019) provided an in-depth analysis of vendor risk management and risk modeling to illustrate AI's advantages to organizations while defining fundamental reasons AI's use within healthcare organizations to benefit the organization and their patients, referral sources, and payers. The concept of mobile health to monitoring health through mobile phones and patient monitoring devices, as a form of providing care as an identified strategy to lower cost while increasing clinical outcomes (Alotaibi & Khan, 2020). The accuracy of AI outcomes driven by the analysis of the methods from predictive analytics support the components to understanding the effects of AI (Gurupur & Wan, 2020). Alotaibi and Khan (2020); Gurupur and Wan (2020); Kerasidou (2020) demonstrated the value of AI through a variety of articles and case studies as support to how technology is used along with business analytics to enhance operational performance to maintain sustainability. Leaders must focus on a variety of methods to identify strategies to predict clinical outcomes based on data analysis from AI. The research demonstrates the value proposition of using technology and analytics to support medical care and ultimately enhance operations to achieve sustainability.

Remote patient monitoring (RPM) services provides leaders the opportunity to manage patient populations with the use of technology in the home setting to enhance quality of care. RPM systems and the use of Nurse Navigators enhance patient-centered service by providing an alternative to follow-up meetings with patients to increase the

quality of care reducing organization costs demonstrates a form of technology to value patient care in the home (Ferrua et al., 2020). To achieve superior medical care through telehealth, the author identified elements to (a) manage performance expectancy, (b) demonstrate social influence, and (c) facilitate conditions focused on exploring telehealth's effectiveness in helping patients with chronic diseases manage their symptoms in the home setting (Dowding & Woo, 2020). Taiwo and Ezugwu (2020) described how the pandemic had changed the standard of practice for hospital contact supported by RPM services through technological innovation. The research suggests value in providing telehealth services through RPM technology to patient populations to focus on clinical outcomes in the home setting.

RPM provides patients with the opportunity to continue the quality of life expected while thriving in pleasures of the home setting, therefore, allowing patients to connect with the care delivery team through technology provides value proposition strategies for organizational success. Monitoring of patients remotely provides organizations with the opportunity to reduce hospitalizations and death prevention strategies to manage serious illness diagnosis is vital for the success of patient outcomes (Boriani et al., 2021). Abdelrazek et al. (2021) described the use of e-health mobile systems as a critical component to the increased need for technology in the care delivery system of healthcare organizations. E-health systems provide patient assurance and awareness while demonstrating the value proposition with low-cost alternatives to organizations focused on sustainability. Patients having prior experience using telehealth showed (a) confidence with a device, (b) appreciation for visiting nurses, and (c) valuing

independence in life which contributes to an organization's overall sustainability (Dowding & Woo, 2020). Also, Dowding and Woo (2020); Ferrua et al. (2020); Taiwo and Ezugwu (2020) demonstrated how the research consisted of patient experiences with services performed by health care professionals, conducting their research in the right areas to identify value and the essential information from organizational leaders who would be implementing these strategies using dashboard to drive clinical outcomes. The value of recommending RPM services within the multidisciplinary design of the care plan to support patient outcomes allows the organizational leaders to better manage their sustainability models through the use of technology.

Increased focus on outcomes related to patient satisfaction with the use of telehealth provides measurable opportunities to enhance operational performance through technology. The use of telehealth for pediatric surgery patients in Canada as a pilot program from the perspective of family and providers was established with one surgeon who provided telehealth clinical follow-up and new consultations to patients in remote communities (Dean et al., 2019). Dean et al. (2019) focused on the patient satisfaction survey from both parents and patients while also reviewing the estimated costs avoided the conclusion was implementing telehealth system provided high value for patients and families from the provider's perspective while developing strategies to achieve sustainability (Dean et al., 2019). Dean et al. (2019) and Dowding and Woo (2020) agreed the use of RPM provides superior care to patient populations through telehealth services. The value of telehealth services provides organizational leaders with strategies to enhance quality care to patient populations to achieve sustainability.

Organizational leaders should focus on health information technologies (HIT) and how this innovation will be delivered in the home setting as patients' preferred place of care while understanding the value of how telecommunications and health informatics. The practice and use of telemedicine in primary care highlight the benefits of telemedicine as they pertain to a primary care setting illustrated by (a) expanding access for patients, (b) enhance patient and physician relationship, (c) improve outcomes, and (d) reduce medical costs (Daniel & Sulmacy, 2015). Telemedicine (and Telehealth services) has expanded rapidly in the healthcare environment, allowing practices to deliver care in the healthcare industry (Daniel & Sulmacy, 2015). However, telemedicine technologies and applications continue to develop and evolve. Multiple states mandated commercial insurance payers cover telehealth services based on healthcare utilization and outcomes, as evidence suggests a reduction in secondary care using telehealth services ultimately improves health care outcomes (Grecu & Sharma, 2019). Because of patients' geographical locations, patients may go to the emergency room for routine problems with the lack of access to care, which increases healthcare costs (Grecu & Sharma, 2019). Exploring the effectiveness of home telemonitoring can impact hospital readmission rates for heart failure patients, driving patient outcomes while achieving sustainability and reducing the cost of delivering care through a digital platform (Long, 2017). Healthcare organizations need to adapt to the healthcare environment changes by delivering care to their patients to accept technological advances (Long, 2017). Leaders use the concept to drive the operational performance to help provide services to their patient populations through business analytics while utilizing telehealth services. Operational performance,

the use of business analytics, and technology provide organizational leaders with the ability to develop strategies to maintain sustainability.

Transition and Summary

Section 1 consisted of the foundation of the study. I provided a background of the problem, emphasizing the critical elements of sustainability, including concepts around business innovations, technological innovations, enhanced reimbursement strategies, and business analytics. Additionally, I provided a problem statement defining the extent of the problem, including the study's general scope.

Further, I illustrated this exploratory; qualitative case study's purpose of identifying strategies HHA leaders implement to maintain sustainability. Also, I defined the research questions that I used to guide the study. I chose a qualitative case study design and used my exploratory interests and research questions to understand the structure entirely. It was appropriate for further research within the healthcare industry, focusing on home healthcare operations and the positive social impacts affecting patient populations.

Finally, I provided other components of orientation to the foundation of my study. I demonstrated the conceptual outline of the value in the strategic management theory and the defined conceptual framework. I also offered a list of operational definitions used in my study. I expressed my perceptions and observations around assumptions and the limitations and delimitations of my research. I described the business and social effect I strive to achieve in developing my research, followed by reviewing relevant literature.

In Section 2, I discuss the research project: the study's purpose, the project's role, and a concise review of the participants, including the rationale of the selection process and the ethical considerations. Finally, an overview of the data collection and analysis procedures is discussed in length. In Section 3, I present the findings and implications of my research. The discussion includes the summary of the data collected, the effects on the professional practice, consequences to the social change due to the business problem, recommendations for actions, and future research opportunities.

Section 2: The Project

In this section, I focus on understanding the aspects contributing to achieving sustainability in a home healthcare business. This section includes detailed information on the development of the research method and design, population, data collection procedures, and the techniques to gather data analytics. This section also includes discussion of the study's validity and reliability through maintaining sustainability within HHAs.

Purpose Statement

The purpose of this qualitative multiple case study was to identify strategies some HHA leaders used to maintain sustainability. The targeted population of this study was five organizational leaders of three HHA and two home health industry consultants in the Northeast United States who have demonstrated success in implementing strategies to achieve their organizations' sustainability. The implications for positive social change included the potential to improve sustainability, promote organizational growth, and continue providing valuable services to local communities. Healthcare organizations in U.S. communities provide ongoing care for patients, particularly those receiving quality care in their homes. Identifying the value proposition for patient populations in our communities that influences positive social change enhanced the patient experience for communities and their patients. Patient populations benefited from receiving the superior quality of care from HHA while in their homes with their families; therefore, sustaining the services received by our patients in their communities was essential for the continuum of valuable patient care.

Role of the Researcher

Data collection was the process of meticulously gathering and analyzing information. I methodically collected and analyzed the data to answer the relevant research questions and assess the outcomes. Lewis et al. (2015) illustrated the researcher's role to present purposeful questions and attentively listening to explore the participant's experiences. Reflexive interviews are examples of tools used to collect data for the research to best understand the participant's position through their personal experiences (Diack et al., 2018). In this qualitative study, I was the primary research instrument to understand the participants' sustainability position. The semistructured interview was the secondary instrument.

My research included five organizational leaders of three HHA and two home health industry consultants in the Northeast United States to explore their experiences in achieving sustainability. Although establishing a relationship between researcher and participant was critical to the study's validity, there was no professional relationship between the study participants and myself. I have worked in healthcare management positions for 7 years and with HHA for the last 3 years.

As a researcher, it was imperative to treat the participants with respect and ethically within the *Belmont Report* protocol guidelines. The *Belmont Report* consists of three ethical principles such as respect for persons, beneficence, and justice. There were three applications to a moral compass: informed consent, assessment of risks and benefits, and subject selection. The process of my research to address ethical

considerations involved multiple aspects. I provided a proper consent form to each potential participant outlining the study components essential to the data collection process. I also stated in the form to participants the ability to withdraw from the study at any time; however, the process of withdrawal required a formal written response illustrating the intent of removing from the study.

In collecting quality data supporting the research, it was critical to understand the importance of the data's reliability that supports a doctoral researcher's validity; therefore, it was essential to understand the risks involved with data quality issues. Lewis et al. (2015) defined participant error, participant bias, researcher error, and researcher bias. Credibility refers to the data's truth and how research represents and interprets the study (Cope, 2014). These risk factors threatened the research process's reliability; however, they demonstrated an understanding of the process's effects. To mitigate bias, I followed the interview protocol with all participants and clarified the results from the participant's experiences and observations through member checking.

In a qualitative study with interviews, the researcher created an interview protocol that aligns with the *Belmont Report* protocol. An established process to follow an interview protocol builds confidence in the data collection process's quality and consistency. I chose semistructured interviews for the interview protocol. Organizing semistructured interviews allowed the researcher to ask additional questions to explore the research questions and participant experiences (Lewis et al., 2015). However, it was essential to follow the same interview techniques for all the study participants.

Consequently, I created my interview protocol and used the same interview techniques and procedures for all my research study participants.

Participants

The eligibility criteria for study participants included steps within a sampling plan, such as recruiting participants who enhanced the data through their rich experiences and aligned with the research (Korstjens & Morse, 2018). Participants were selected to influence the study and support your business problem positively. The chosen participants ensured an adequate understanding of the study's phenomenon while completely and knowledgeably reflected on how their experiences benefited the research. Only home healthcare leaders who experienced poor performance but achieved sustainability through enhanced operational performance using strategies participated in the study.

Gaining access to participants was essential to the success of the research study, along with relating their experiences with the study's objective was vital to the credibility of the research. Gaining access to participants was not an easy task and required a lot of hard work, strategic planning, and determining the right candidates to participate in the study's research (Disney et al., 2020). To obtain access to participants in the home healthcare industry, I sent potential participants in the Northeast United States an e-mail detailing my research study illustrating the value proposition of my research as a business problem in the home healthcare industry, but also demonstrated how the research positively provided social change with patient populations and communities. I followed

up with a call to the potential participants to discuss further the purpose of the study and its impact on the industry.

Building trust was a critical aspect of establishing a working relationship with participants. Participants sensed an open and approachable attitude while fully understanding why you are interested in their experiences (Liljedahl et al., 2019). Providing informed consent enhanced the trust of participants while creating research strength. Some other strategies for establishing a working relationship with participants were to focus on retention and recruitment strategies while demonstrating how the participant's experience provided value to the study's future outcome (May & Perry, 2014).

In the initial e-mail to participants, I outlined the purpose of the study, why the participant was eligible and provided value to research, the timeline of the research and process, informed consent as it related to the ethical principle of the *Belmont Report*, how I protected privacy through the process, and an invitation to interview through video conferencing capabilities. Success in aligning the overarching research question with the participants' characteristics was essential to obtaining the value from the participants' own experiences, focused on illustrating the project's scope and the advantages expected from the overall project (Korstjens & Moser, 2018). Based on successfully aligned participant experiences with an overarching project plan, I invited and interviewed five participants from the home healthcare industry to answer my study's central research question.

Research Method and Design

Research Method

In this study, I used the qualitative research method to explore the strategies HHA leaders used to maintain sustainability in the Northeast United States. Qualitative research was appropriate as it explained reasons and motivations to provide insights in obtaining specific information on phenomena and behaviors to a particular target population (Park & Park, 2016). The qualitative methodology's purpose was to provide an in-depth and illustrative approach to understanding the various levels of a problem through analysis and theoretical justification through participant experiences (Almeida et al., 2017). Qualitative research was inductive by nature, while the researcher explored insights into a given business problem to analyze the meaning (Mohajan, 2018).

In contrast, to qualitative research, Lewis et al. (2015) described quantitative research as a general way to examine data through variables' characteristics and relationships. Almeida et al. (2017) described quantitative analysis as a method to focus on the possibility of collecting quantifiable measures of variables from samples of a specific population. As the proposed study's purpose did not concentrate on variables' characteristics or relationships, the quantitative method was not suitable for this study. The mixed method's theoretical foundation was to identify and master the qualitative and quantitative research methods' strengths and weaknesses to create the mixed method's basic principle (Ozturk & Sahin, 2019). Due to the quantitative method not being appropriate for this study, the mixed-method approach was also not suitable.

Research Design

The qualitative multiple case study design was selected because it provided the opportunity to explore strategies home healthcare agency leaders used to achieve sustainability. Yin (2018) described the analytical value of using two (or more) cases as significant to the overall study; therefore, providing a more robust capability for identifying and comparing strategies for HHA to achieve sustainability. According to Craig et al. (2018), researchers need to understand each person's practical knowledge and document their experiences to create results. I used the multiple case study design for this study because I wanted to explore strategies that home healthcare leaders implemented to achieve sustainability.

Other qualitative approaches such as narrative research and phenomenological research designs were not the correct designs for this study. Yin (2018) defined the narrative research design as an approach to interpreting or analyzing an event or sequence of events to describe participants' personal stories. The narrative research approach was inappropriate for this study as the process did not explore achieving sustainability through interviewing participants only through the description of personal stories. Padilla-Diaz (2015) discussed the theory of phenomenological research as a design to study the meanings of participants' lived experiences. The phenomenological research approach was unsuitable for this study as the strategy focused on the participants' lived experiences rather than analyzing the data to achieve sustainability. For these reasons, neither the narrative research nor phenomenological design was appropriate for this study.

Data saturation occurs when researchers are confident, they have received sufficient information to conclude nothing new or surprising will arise from additional data gathering and that any further information would be redundant (Thorne, 2020). Further, Baker et al. (2018) described data saturation as the *gold standard* for determining sample size in qualitative research as the concept is present in all qualitative research. Chen et al. (2020) stated that most of the new information is found at five to six interviews, with little information gained as the sample size increased. I interviewed participants until the information was repetitive.

Population and Sampling

The population was defined as multiple HHAs with at least 300 employees in the U.S. Northeast region. This study's sample size was composed of at three chief financial officers and two home healthcare consultants who developed strategies to achieve and maintain sustainability. I used the purposeful sampling method specifically with intensity sampling. Purposeful sampling is ideal as it requires access to key participants in a study that can help identify rich information providing value to the research (Suri, 2011). The use of purposeful sampling was appropriate for qualitative research as it allowed the researcher to select participants who best supported the study's objectives through years of experience and length of experience (Galehdar et al., 2020). Suri (2011) illustrated how intensity sampling involves selecting rich examples of a phenomenon with the intensity to support the success or failure of a study. I chose the use of intensity sampling as a strategy to develop a comprehensive understanding of the research to identify rich

cases that supported my research question while supplementing the review of cases that demonstrated the nature of success to the overall study.

The sample size for qualitative research is critical to collecting information; therefore, understanding the study's number justified the population and sampling methods. Sample sizing in qualitative research provide appropriateness of the composition and size of the research (Barnett et al., 2018). Therefore, the sample size is contingent on various factors and is not straightforward to the number of participants required. Chen et al. (2020) discussed how qualitative researchers evaluated when new information occurred after a small sample size is collected to identify themes with five participants interviewed. For this reason, selecting five home healthcare leaders in the Northeast region of the United States provided a concise understanding of the strategies home healthcare leaders used to achieve and maintain sustainability.

Data saturation is reached when additional information is collected, providing little new information (Lewis et al., 2017). According to Thorne (2020), data saturation suggests confidence that sufficient richness of information obtained to determine no new themes will arise from further data collection. Baker et al. (2018) illustrated how the concept of saturation operationalized to be consistent with the research question. I continued to interview participants until all data was repetitive and no new themes were developed.

Yin (2018) declared participant interviews should take place in a natural setting. Abd Gani et al. (2020) recommended researchers find the most comfortable location and surroundings for a participant to ensure the effectiveness of an interview. For this reason,

the interviews occurred in the participants' natural settings or virtually in a location of the participant's choice. Confidentiality, in the participants natural setting or virtually, required the researcher to communicate with participants on how to achieve confidentiality within the interview setting with clear process to confirm confidentiality. The location of the interview setting ensured the participants' confidentiality by providing a quiet, private room where others were unable to observe. I ensured confidentiality by using numbers and alpha characters instead of using participants real identity, electronic files were stored on personal password-protected computer and backed up on a password-protected USB flash drive, and paper documents were stored in a locked file cabinet at researcher's residence for a period of 5 years.

Ethical Research

A researcher's primary obligation was to perform research ethically to adhere to the Belmont Report's guidelines. The three elements to consider in ethical research were informed consent information, the comprehension of information, and voluntarism. The study's top priority was to secure informed consent while identifying the participants' appropriate sample to illustrate successful study outcomes. According to Johnson (2018), the complexity of individual factors provides the participants with an increased engagement in a study that supports the research's validity.

After I obtained Institutional Review Board (IRB) approval number from Walden University for the study (#10-19-21-0975246), I provided each participant with informed consent by e-mail, defining the doctoral study components. The consent form's content included the study's purpose, illustrated procedures for the interview process, and safety

measures for confidentiality purposes (See Appendix B). Additionally, I stated to them in concise language the participants' consent was voluntary, and they could withdraw from the study at any given point in time. I outlined within the consent form the nature of the information collected, the method used to manage the research data, and how I protected the privacy of the participants. I did not exclude any research participants due to attributes such as race, sex, age, etc.

Participants could withdraw from the research at any point during the study. To withdraw from the study, participants must e-mail me with a written response illustrating their intent to withdraw from the study even though they agreed to participate; at that time, I terminated the interview and thank them for their time and destroy all data from that participant. There was no incentive for a participant to engage in the research. My goal was to maintain a professional demeanor throughout the interview while encouraging participant engagement while protecting the participants' confidentiality and adhering to ethical practices.

Data protection and confidentiality was necessary to the participants and organizations in the study. The security of the information was necessary to secure the research data containing personal information; therefore, the protection included password-protected files when the research data was stored electronically. Documents were separated from the research data to add more enhanced steps to secure participants' privacy. Any information that may reveal the participants or the organizations remained private.

According to Sween-Cadieux and Turcotte-Tremblay (2018), breaches of privacy can have a negative effect on the participants if stakeholders can identify participants due to inadequate confidentiality safeguards. To mitigate the risks of a confidentiality breach, I protected the participants' and organizations' names by assigning a letter to represent each participant (P) followed by a number (PC1 would be P1). The codes ranged from P1 to P5, representing the five participants, while the organization's name was not known to the reader. All research data in paper form was held in a locked cabinet for 5 years until destroyed.

Data Collection Instruments

Researchers make various decisions throughout the process, potentially changing the study's research (Yin, 2018). I served as the primary data collection instrument and used semistructured interviews to explore home healthcare leadership strategies to achieve and maintain sustainability. Researchers organizing semistructured interviews have the flexibility to explore more enhanced questions than the initially proposed interview questions (Adhabi & Anozie, 2017). There are six possible data sources, including documentation, archival of records, interviews, direct observation, participant observation, and physical artifacts (Yin, 2018). Participant interviews were the primary the data collection process to enable the researcher to access participants to extract accurate information (Yin, 2018). As Akinyode & Khan (2018) described, data collection allows researchers to gather information from multiple sources to understand the meaning of the problem. In addition to semistructured interviews, I used the archival records from

participants as an additional data source to understand the strategies used by home healthcare leaders to achieve and maintain sustainability.

I used the interview protocol (Appendix A) to ensure the interviews (through video conferencing technology) were successful while asking the participants the same questions. Organizing interviews is imperative for qualitative researchers to be successful, as the interview protocol allows participants to reflect deeply on the research topics thoughtfully and purposefully (Braaten et al., 2020). The qualitative method's interview process focuses on the research's primary objective exploring your participants' personal experiences identifying gaps or problems that require addressing (DeJonckheere & Vaughn, 2019). The interview process started with a greeting and introduction to the study's purpose followed by providing the participants with the signed consent form for their records. Using the interview protocol (Appendix A) helped me to mitigate inconsistencies within the data collection process with each participant. I provided the participants with information involving the member checking procedures to certify the data's reliability and validity.

Member checking is the procedure to share data with participants to obtain their feedback and interpretations (Hitchcock & Liao, 2018). Candela (2019) described how the member checking process maintains reliability and validity in a study through informal testing of research by solidifying participants' interpretations. After concluding the interviews, I used the member checking strategy to enhance the data collection process's reliability and validity. I reviewed the participants' responses and corrected my interpretations of the answers they provided during interviews.

Data Collection Technique

My data collection process included two data collection techniques: the primary data source from the semistructured interview technique and archival records and organizational documentation. Qualitative data collection techniques depend on the research's concepts, objectives, and information gathered to satisfy the objectives (Akinyode & Khan, 2018). I conducted semistructured interviews with chief financial officers and home healthcare consultants in the Northeast of the United States with at least two healthcare experience years. Asking participants open-ended questions allows them to have the freedom of expression and provides participants with the opportunity to share their personal experiences (Yin, 2018). During the interview, I took notes on the participants' physical mannerisms such as expressions and tones as they answered the questions. I recorded all interviews for video and audio documentation, took detailed notes, and then transferred those notes to Microsoft Word. The second source of data documented relevancy to the company's archival of records such as public tax returns, and other supporting documents.

The advantages of using a semistructured interview process are the ability to offer a high response rate from participants (Almeida et al., 2017), allows flexibility around the structure of the interview, provides the researcher with the opportunity to enhance questions throughout the interview process (Adhabi & Anozie, 2017), and allows researchers to strengthen the relational focus with the participant to improve engagement (DeJonckheere & Vaughn, 2019). The disadvantages of using a semistructured interview process included not providing a well-developed interview guide by the researcher that

allowed for open-ended questions. To mitigate this disadvantage, I used an interview protocol (see Appendix A). In addition, the participants may be hard to engage through a flexible interview process, and researchers were underestimating the resources required to recruit participants, interview effectively, and transcribe the data (DeJonckheere & Vaughn, 2019).

Data Organization Technique

The need to develop, implement, and report on systematic plans to analyze qualitative data while prioritizing results was the process to organize the findings of the research (Hemphill & Richards, 2017). After transcribing the interviews, I managed the data using Microsoft Word, saved each separate document according to the interview date, and stored the interviews on a specific file on my personal computer. I confirmed data by providing participants the opportunity to corroborate their responses from the interview process as a guarantee to validity by use of member checking. I secured my computer using a specific password that was only known to myself and I always lock my computer when not using it. I used a coding process, which included the following: identified meaning from the codes according to a table categorizing each theoretical proposition, developed codes based on participant responses, and organized these codes by color to recognize the main themes from the analysis of the interviews. According to Korsgaard and Linneberg (2019), the conceptual approach to coding reduces a large amount of data and make it readily accessible while increasing its quality through color-coding specific critical themes identified through the qualitative analysis. Following

Korsgaard and Linneberg (2019) concepts, I listed each theme in Microsoft Word, color-coded each theme, and organized the data analysis by color-coded themes.

Qualitative data analysis manages the complexity of multiple interpretations while balancing research goals with the need to collect evidence in a database to enhance the study's reliability (Hemphill & Richards, 2017). The collected data stored in a database for documents, materials, narratives with participants is necessary to document the research material collected while increasing transparency (Yin, 2018). I keep and organize all participants' interviews in a physical file for data storage purposes. All electronic elements from each participant's interview were transferred to an external hard drive and stored in a locked safe in my residence for a predetermined period of at least 5 years. As the predetermined period comes to an end, I will destroy all data at the end of this period.

Data Analysis

Data analysis is a process used to arrange, evaluate, and interpret information to gather information (Yin, 2018). The qualitative data analysis is a five-step process: (a) compiling, (b) disassembling, (c) reassembling, (d) analyzing, and (e) concluding (Yin, 2018). The first step of the data analysis process illustrated by Yin (2018) was for the researcher to compile all data, the second step was to disassemble the data into manageable steps, the third step was to create codes and critical group themes from the data, and the fourth step was to interpret the data from the developed themes. The final step in the data analysis process required the researcher to make conclusions from the fourth step's interpretations.

Triangulation is a research strategy that describes multiple data sources to ensure the data analysis is accurate and comprehensive (Moon, 2019). Abdalla (2019) defined the four triangulation types as data triangulation, theoretical triangulation, researcher triangulation, and methodological triangulation. Methodological triangulation uses multiple research methods to collect data (Moon, 2019). Data triangulation focuses on different data sources that are produced by different people in different places (Ferreira et al., 2020). I used methodological triangulation in my study with two data collection methods: semistructured interviews and archival records. After the data collection process and member checking, I triangulated the data from both sources (text and interview), and coded the data related to key themes. In thematic analysis, the researcher reviews rich textual data to identify, and report repeated patterns (Kiper & Varpio, 2020).

The first step in the data analysis process was to review and transcribe the completed interviews. The second step was to code the data and look for key themes. In my study, after the interview process, I reviewed and entered the archival records obtained into Microsoft Word and used NVIVO Pro for Windows software to assist in my identification of patterns and organized the data into key themes so I could complete my analysis on theme development. The final step in data analysis was to draw conclusions from the key themes developed from the interviews and archival documents.

Relating the themes to the study is one data analysis strategy (Yin, 2018). Coding data is the process of analyzing qualitative information by separating the data, and grouping themes in a meaningful way (Elliott, 2018). Through the data analysis, themes emerged that supported achieving and maintaining sustainability. I reviewed how the key

themes aligned with the concepts and keywords of the literature review. Grouping and analyzing the gathered information assisted in developing themes across the conceptual framework.

Reliability and Validity

Researchers substantiate their findings' accuracy through replication and consistency to achieve the same results when data are reliable and valid (Lewis et al., 2015). Research is valid and dependable when the findings demonstrate the accurate representation of strategies utilizing multiples sources of evidence (Yin, 2018). In the following section, I elaborated on the relevance of how dependability, credibility, transferability, and confirmability contributed to the reliability and validity of a qualitative research study.

Reliability

Dependability and rigor are strategies researchers utilize to ensure reliability in qualitative research (Cypress, 2017). According to Abib et al. (2019), reliability is essential to provide evidence towards the research's accuracy. Reliability is rooted in the idea of data adequacy to show consistent support to all participants' responses (Barrett et al., 2018). In Section 2, I documented procedures for recording interviews, prepared notes from interviews, and interviewed participants using an interview protocol.

In qualitative studies, researchers use member checking and transcript review to support the reliability and validity of the information collected during the interview process (Yin, 2018). Member checking is the process that provides credibility for the researcher to allow participants the opportunity to clarify interpretations from the

interview process (Hitchcock & Liao, 2018). Triangulation reduces the risk of your study's conclusions reflecting only the bias to a specific collection method; therefore, member checking is vital to verify the information using informal testing with participants on their responses (Candela, 2019). After conducting the interviews, I used member checking to enrich the reliability and validity collected from the interviews. I met with the participants a day after their discussion to confirm the interpretations developed from the responses to ensure accurate information is collected.

Validity

Reliability is critical to research quality; however, while it is necessary, it is not adequate by itself to provide good-quality research (Lewis et al., 2015). Trustworthiness and validity in qualitative research refer to the rigor of the research design, the researcher's credibility, the accuracy of the findings, and the applicability of the research methods (Johnson & Rose, 2020). Validity and reliability increase transparency and decrease the researcher's opportunities to interject bias into the research (Mohajan, 2017). To guarantee the validity, I used member checking with my research. I validated data for accurateness by providing participants the opportunity to confirm their responses from the interview process.

Credibility is a vital aspect for a healthy qualitative study as it details the phenomenon of interest while helping to assess the data and research conclusions (Hitchcock & Liao, 2018). Qualitative research is credible when participants share the same experiences to enhance the research (Cope, 2014). Prolonged engagement, triangulation, and member checking are crucial aspects to strengthening the research's

credibility (Hitchcock & Liao, 2018). To ensure credibility, I recorded all interviews and validated the information with the member checking technique. Validation of the data was essential for accuracy; therefore, I asked participants to confirm the interpretations of the responses provided during the interview.

Transferability is an external validity tool to describe research components such as design, context, and understandings to another setting, population, or group (Lewis et al., 2015). Because transferability focuses on transferring a study's result to another, a researcher uses tools to assess specific concepts related to thematic areas of focus (Kaas et al., 2019). A thorough understanding of the research allows future researchers to decide whether the research findings are credible and can transfer to another study (Bouchal et al., 2018). As I explored home healthcare leaders' strategies to achieve sustainability in the Northeast region of the United States, the research boundaries affected the transferability to other geographical locations. To ensure the study's transferability, I provided a detailed description of the participants, the research context, and detailed information on the data analysis process.

Hayes and Lemon (2020) described confirmability as a strategy to address whether the interpretations and findings from the participants' experiences and are not the bias of the researcher. Confirmability enhances research by maintaining an audit trail of information in the researchers' documentation process (Hemphill & Richards, 2017). I assumed confirmability through member checking, checked the data through the collection process, and recorded all personal insights to the study. Hitchcock and Liao (2018) defined member checking as a credibility and transferability technique used in the

interview transcripts review. Establishing a process to review the data for accuracy is a strategy to measure errors that could damage research results (Mohajan, 2017). To enhance the study's confirmability, I established a procedure addressing participants' confirmation of the research questions' interpretations and how they related to the research and conceptual framework.

Data saturation occurs when no new information is generated (Thorne, 2020) and the theoretical model or research question has stabilized (Chen et al., 2020). Lewis et al. (2015) stated a researcher should continue collecting qualitative data if the sample size does not provide enough information to demonstrate data saturation, such as conducting additional interviews. For that reason, I continued to interview participants until the data became repetitive, no new data introduced itself, or no other themes were presented.

Transition and Summary

In section 2, I noted the purpose of this qualitative multiple case study was to identify strategies HHA leaders implemented to maintain sustainability in the Northeast region of the United States. I used the qualitative method to understand the strategies used by home healthcare leaders to achieve and maintain sustainability. Qualitative research supports a researcher in developing a deep understanding of a specific phenomenon (Cho et al., 2020). The exploratory multiple case study demonstrated my approach to the investigation because it allowed for the exploration of strategies that home healthcare leaders needed to understand the factors contributing to maintaining sustainability. Furthermore, I included a discussion on my role as the researcher, the

participants, the ethical concepts around this study, and the data collection process, including the techniques utilized to support analysis.

In Section 3, I presented the findings of my research. The results included the detailed description of the study supporting my semistructured interview responses with participants, the procedures used to review documents, the key themes presented in analysis, and a comparative analysis with other peer-reviewed studies from my literature review. Additionally, in Section 3, I provided a detailed discussion on the applicability of the results supporting business practice within the home healthcare industry and how the results illustrate value to patients, communities, and organizations demonstrated through positive social change.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative multiple case study was to identify strategies some HHA leaders used to maintain sustainability. I obtained the data from interviewing five leaders in the Northeast United States in the home healthcare industry and reviewed related organizational documents demonstrating operating performance to maintain sustainability. The data revealed strategies HHAs implemented within their organizations from the study's findings.

Other data sources used were organizational performance indicators and archived organizational records on organizational performance. Before the interviews, the participants reviewed and accepted the informed consent form through email response, "I accept." Each interview lasted 20 to 30 minutes, and all discussions occurred in a safe, secure setting through video conferencing using Microsoft Teams. Because I used three HHAs and two consulting firms, I assigned participants numbers 1 through 5 with the additional label by their organization; for instance, PC1 represented Participant 1 in the research study from the first consulting firm and PH2 represented Participant 2 in the research study from the second HHA. The findings illustrated strategies leaders implemented to maintain sustainability through operational performance.

Presentation of the Findings

I posed one research question for this qualitative multiple case study: What strategies do HHA leaders implement to maintain sustainability? The interviewed leaders were from three HHAs and two consulting firms specializing in the home healthcare

industry in the Northeast United States, where leaders successfully implemented strategies to improve operational performance. I identified three common themes among the five leaders in the home healthcare industry. I protected the identity of the participants by assigning these codes: PC1, PH2, PH3, PH4, and PC5 to ensure confidentiality.

Cho et al. (2020) described qualitative data analysis as sorting and sifting through material to identify similar phrases, patterns, and themes. I discovered the themes based on codes I identified during the responses to questions in the interview. I categorized each group of codes and explained how the themes found in the research supported the strategies leaders implemented to maintain sustainability through operational performance. Upon the conclusion of the analysis collected from semistructured interviews, three themes emerged:

1. Enhance performance through the management of data analytics.
2. Diversify reimbursement.
3. Develop effective recruitment and retention strategies.

I used the NVIVO Pro software from Windows to assist in analyzing, and theme development along with the summary of conclusions from the interviews to support the themes that emerged. I validated the discovery of the themes based on the in-text coding I developed through the analysis of the participant responses to my research questions. The themes that emerged were referenced constantly through all the participant interviews (see Table 2).

Table 2*Themes, Number of Related References, and Participants*

Theme	Number of References	Participants
Theme 1	52	PC1, PH2, PH3, PH4, and PC5
Theme 2	27	PC1, PH2, PH3, PH4, and PC5
Theme 3	31	PC1, PH2, PH3, PH4, and PC5

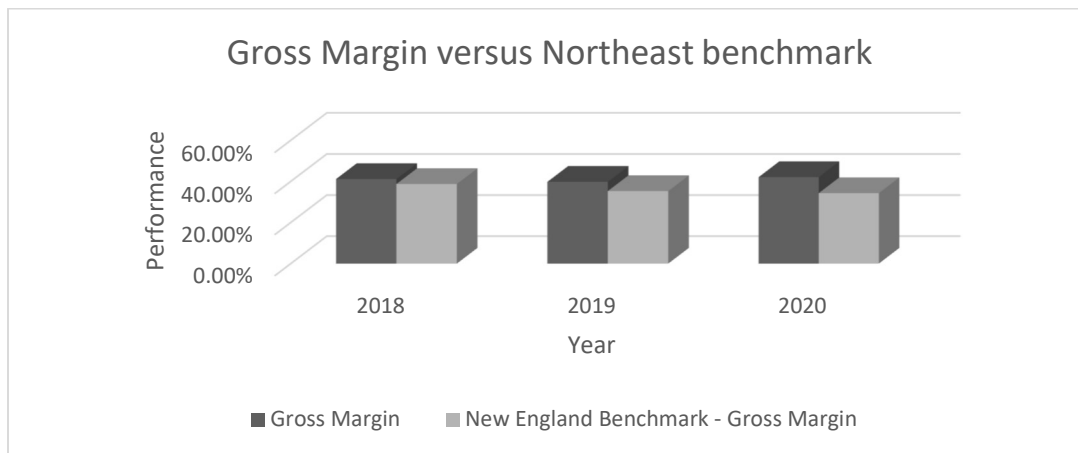
Note. Evaluation of participant responses within interviews referencing

Theme 1: Enhance Performance Through the Management of Data Analytics

Enhanced performance through data analytics management was the first theme that emerged from developing the research participants' responses. PC1 stated, "The first step is to look at the key metrics within the organization, like census and acuity, to understand the impact on outcomes and organization's performance." PC5 mentioned, "The number one indicator to manage through data analysis is gross margin to understand the profitability of an organization and share this analysis and the metrics with your management team." PH3 emphasized, "Another focus [is] on terms of operations; you also have to look at expenses and negotiate tough contracts with our medical suppliers to manage sustainability." Byrd and Wang (2017) described the importance of analyzing data in real-time and identifying business insights to improve performance through comprehensive reporting and dashboard management. The participants expressed this theme as an essential strategy to understand and improve operational performance. Figure 2 reflects the financial performance indicator of gross margin by participants in the Northeast United States as a driver for understanding the participant's organizational performance from 2018 to 2021.

Figure 2

Enhance Performance through Analysis compared to Benchmarks



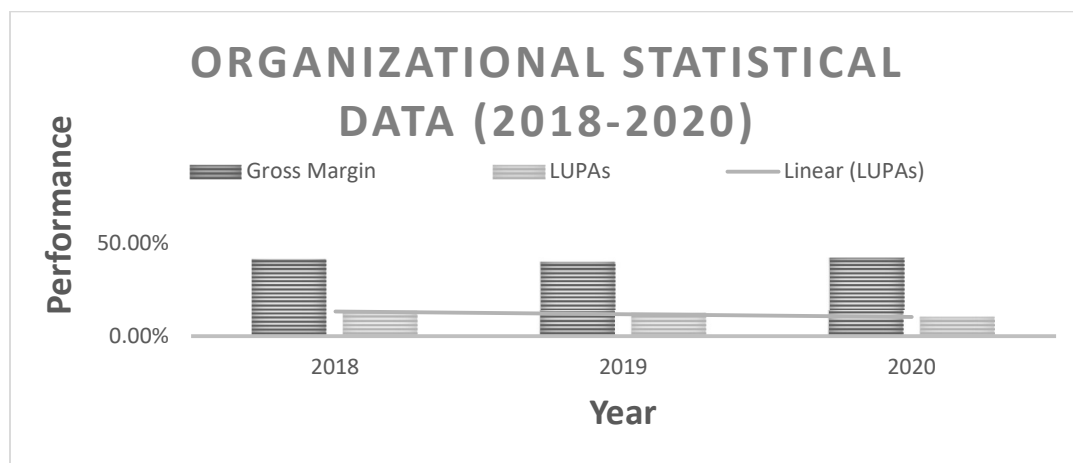
Note. Gross margin compared to Northeast Gross margin benchmark analysis (2018-2020).

Figure 2 reveals that gross margin performance is stronger than the average gross margin in the Northeast consistently from 2018 through 2020. PH2 expressed, “Organizations that manage metrics with key performance indicators focus on their organization vitality and identify strategies to break down specific areas.” Some participants stated that of the many metrics managed, the metrics of most importance were (a) low utilization payment adjustments (LUPAs) and (b) gross margin (PC1, PH2, PH3, PH4, and PC5). To understand an organization’s operational performance, I reviewed the participant’s organizational data enhancing performance in the Northeast United States from 2018 through 2020. PH2 cited, “when speaking about data analytics; you need the flexibility to break the analytics down to understand what the drivers are with performance, is its readmission rates, revenue per visit, or cost per visit by the

payer?” Figure 3 reflects the key performance indicator illustrating the management of LUPAs by the participants as a statistical driver to understanding an organization’s performance from 2018 through 2020.

Figure 3

Enhance Performance through the Management of Data Analytics



Note. Gross margin and LUPA analysis on operational performance (2018-2020).

The data in Figure 3 show the gross margin performance has remained stable from 40-42% from 2018 through 2020. However, the overall decline in LUPAs was 38% from 2018 to 2020, which provides a positive metric to illustrate sustainability. In addition, the operational performance maintained over 4 years due to data analytics, especially with a focus on LUPA management, provided support to maintaining sustainability. PH4 stated, “We have seen substantial improvements in our reimbursement with the decrease in LUPAs due to the management, training, and education of these specific data metrics.” Theme 1 relates to Kaplan and Norton's (1992) balanced scorecard theory. Eldeeb et al. (2020) described the importance of

implementing a balanced scorecard theory using financial and nonfinancial measures while reporting to all levels of management; therefore, it relates to Theme 1 of the study in developing a value proposition of enhancing operational performance through data analytics. The research presented in this study demonstrates how Theme 1 relates to the balanced scorecard methodology through understanding the value of dashboard management and managing data analytics to enhance performance. The key indicators that emerged from research were referenced by most of the participant interviews to demonstrate what metrics provided value to development of strategies to maintain sustainability (see Table 3).

Table 3

Metrics, Number of Related References, and Participants

Metrics	Number of References	Participants
Gross Margin	5	PC1, PH2, PH3, PH4, and PC5
LUPAs	5	PC1, PH2, PH3, PH4, and PC5
Census	2	PC1, PH2

Note. Evaluation of participant responses within interviews referencing

The metrics presented within Theme 1 were discussed by all participants in the interviews as key metrics to managing operational performance and maintaining sustainability.

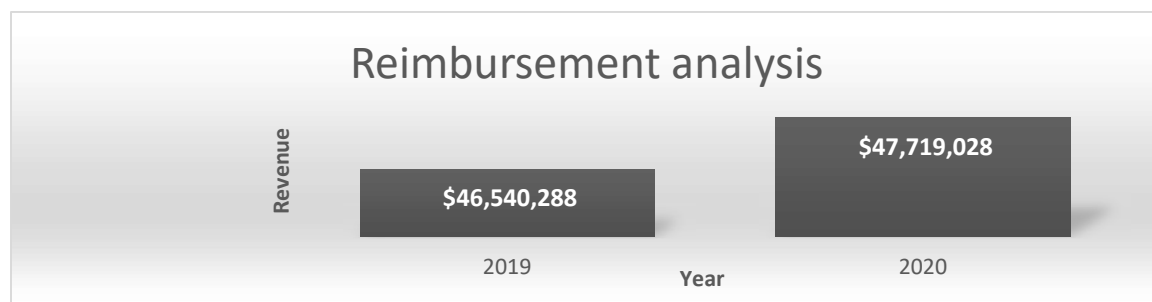
Theme 2: Diversify Reimbursement

Diversified reimbursement was the second theme that emerged from the research participant's responses. Bender et al. (2020) cited previous researchers focused on how decisions are made through innovation as the appropriate course of action to enhance sustainability. The participants stated that an effective strategy to maintain sustainability

was focusing on and diversifying reimbursement to improve operational performance (PC1, PH2, PH3, PH4, and PC5). PH4 stated, “Home health organizations need to focus on business development efforts as a strategy to increase reimbursement.” As a strategy, telehealth services enhance reimbursement through diversification and optimize care coordination while allowing providers to focus on other services like telehealth services rather than traditional Medicare (PH2 and PC5). PC5 mentioned organizational leaders need to “focus on value-based methodologies as a strategy to work with Medicare Advantage plans to develop a risk-sharing model where you use measures as a basis for enhancing reimbursement as providers demonstrate value.” Hogle (2019) illustrated how value-based care is required as an essential financial necessity to enhance reimbursement through an incentive strategy. Multiple participants discussed the importance of value-based arrangements to enhance reimbursement, primarily as providers focus on population health concepts (PH3 and PC5). Figure 4 reflects a comparison of reimbursement from one of the participant’s organizations from 2019 and 2020.

Figure 4

Diversify Reimbursement: Participant Comparison of Reimbursement over 2 years

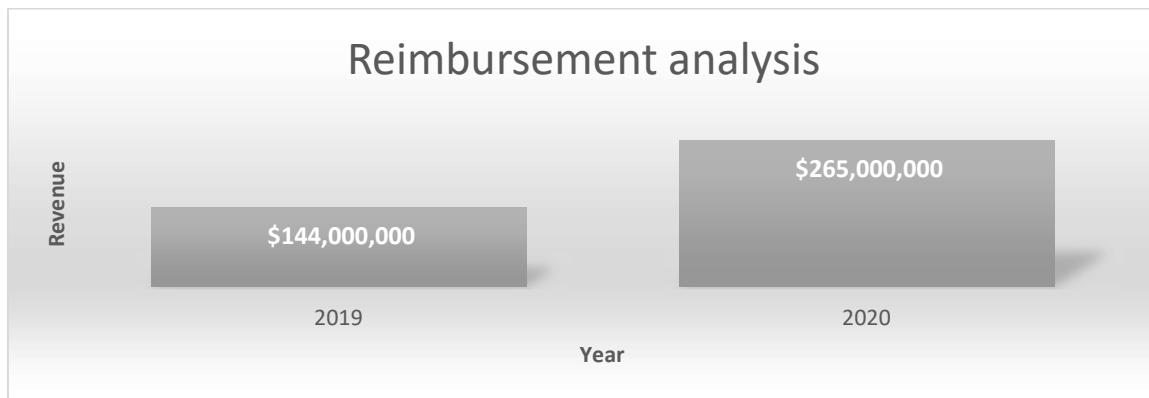


Note: Reimbursement analysis on operational performance (2019-2020).

Figure 4 shows how diversifying reimbursement led to an increase in total reimbursement of \$1.17 million (or a 3% increase) and to organizational performance when comparing reimbursement from 2019 to 2020. PH2 stated, “We increased our telehealth significantly, targetting 30% of our census focusing on the correct primary diagnosis.” Telehealth services are frequently provided in the home setting by home healthcare organizations mainly to improve clinical outcomes and patient satisfaction, and reduce costs by lowering readmission rates to hospital systems or payers (Atav & Summers, 2020). Taiwo and Ezugwu (2020) described how the COVID-19 pandemic had changed the standard of practice for hospital contact supported by RPM services through technological innovation. PH2 mentioned, “With the pandemic last year; we had to shift our strategy to provide telehealth services and become fluid with adapting to our strategy.” The findings related to enhanced reimbursement to maintain sustainability as the findings of Taiwo and Ezugwu (2020) and Atav and Summers (2020), who also found that telehealth services supported operational performance. Figure 5 reflects the comparison of reimbursement from a participant’s organization to enhance an organization’s performance from 2019 and 2020 by diversifying reimbursement.

Figure 5

Diversify Reimbursement: Participant Comparison of Reimbursement over 2 years



Note: Reimbursement analysis on operational performance (2019-2020).

Figure 5 reveals how diversifying reimbursement led to an increase in total reimbursement of \$121 million (or 84% increase) when comparing reimbursement from 2019 to 2020. PH3 stated, “We have a fairly sophisticated approach to business development and saw an increase in reimbursement due to acquisitions and mergers, and another strategy to focus on new program development, such as home infusion.” Organizations use population health management strategies to improve care quality while reducing organizational costs (Steenkamer, 2019). The value of community nurses to local patient populations with extensive knowledge in patient-centered care and how population health management concepts, including data analytics, help provide more comprehensive services to local communities (Duncen, 2019). PH3 mentioned another strategy is to enhance reimbursement through negotiations with managed care payers through value-based arrangements using population health concepts because the strategy supports diversifying organizational reimbursement streams.

The findings related to how increased focus on reimbursements improve operational performance to maintain sustainability, supporting Steenkamer 's (2019) and Duncen 's (2019) findings on the importance of value-based arrangements to diversify reimbursement to maintain sustainability. Theme 2 relates to Kaplan and Norton's (1992) balanced scorecard theory. Balogova et al. (2020) discussed the significance of improving operational performance as it is vital to monitor and respond to trends affecting sustainability as a strategic management tool to anticipate what will happen in the future. The research presented in this study demonstrates how Theme 2 relates to the balanced scorecard methodology by understanding the value of dashboard management and managing reimbursement metrics to enhance operational performance as a strategic management tool to analyze the trends affecting sustainability and anticipate what would happen future. Theme 2 presented strategic results to the value of diversification of reimbursement through participants' organizational reimbursement trends to include telehealth and home infusion services. The analysis illustrated in Figures 4 and 5 demonstrated an increase to organizational reimbursement allowing for HHA leaders to use enhanced organizational performance to allocate resources to recruitment and retention strategies to enhance operational performance and maintain sustainability.

Theme 3: Effective Recruitment and Retention Strategies

Effective recruitment and retention of employees was the third theme that emerged from developing the research participants' responses. Bourke et al. (2021) described the urgent need for employers to develop strategies to promote retention of the current workforce. PC1 stated, "Organizations need to be more creative with strategies to

retain employees, especially in the current environment.” PH3 summarized, “One of the biggest challenges right now is the issue of employee retention and developed strategies including intensive salary comparisons within the market.” As organizational leaders strategize and implement recruitment and retention strategies, it is critical to understand operational performance.

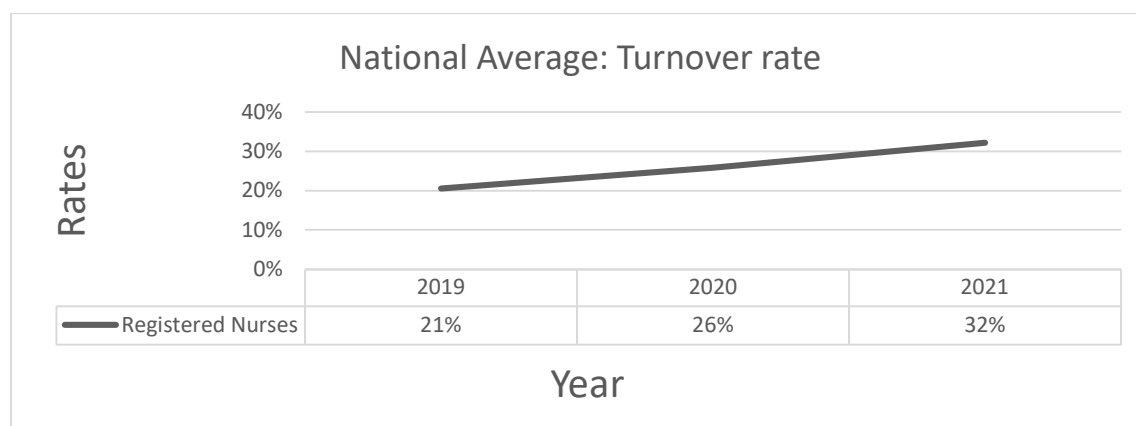
The COVID-19 pandemic provided a lot of issues for organizations across the United States; however, recruitment and retention are the most prominent, and most costly concerns organizations face with maintaining sustainability. During COVID-19, many healthcare workers have experienced unprecedented times, including isolating themselves, feeling overwhelmed, feeling burned out socially, and being afraid to make mistakes; therefore, healthcare leaders shared concerns around sustaining inadequate workforces (Rangachari & Woods, 2020). PH2 explained, “The challenges of recruiting and retaining nurses is a concern, because if you do not have nurses, you cannot provide services to patients.” Young (2021) discussed how high turnover rates among healthcare workers could negatively affect an organization, including not providing services to patient populations in our communities. When I asked what strategies, participants implemented to address the critical challenge of workforce turnover, PH2 summarized, “Recruitment and retention strategies such as sign-on bonuses were identified as opportunities to demonstrate strategies to address workforce challenges”.

Home healthcare organizational leaders identify challenges daily with managing patient populations in rural communities; however, organizational leaders must understand all the challenges in our communities related to providing services to patients,

including having the workforce to provide patient care. Cosgrave (2020) described the contributing factor with health inequalities as attracting and retaining a talented workforce in our rural communities and meeting patient needs. Figure 6 reflects the turnover rate for registered nurses nationally over 3 years, demonstrating the challenges HHA leaders encounter to understand how to implement strategies to enhance the performance by focusing on recruitment and retention plans.

Figure 6

Effective Recruitment and Retention Strategies: National Average Turnover Rates



Note: Turnover rate analysis of registered nurses in the healthcare industry (2019-2021).

Adapted from “Home health RN salaries and turnover increase,” by Home Care Salary and Benefits Report, 2021, *HomeCare News*.

(<https://www.homecaremag.com/news/study-home-health-rn-salaries-turnover-increase>).

The data in Figure 6 reveals HHA leaders must understand turnover rates for registered nurses to develop recruitment and retentions strategies to maintain sustainability as the national trend from 2019 shows an increased turnover rate of registered nurses. The turnover rates since 2019 have increased 11%, according to

HomeCare News (2021); therefore, HHAs must enhance their recruitment and retention strategies of skilled clinical positions to continue to provide necessary services to the patients in our communities while maintaining operational performance. The data illustrated in Figure 6 provides an insight to why HHA leaders must understand turnover rates of the organization because the economic and social impact could negatively affect strategies to maintain sustainability. Alayli et al. (2021) stated how the recruitment of healthcare professionals is a significant challenge and needs effective strategies around recruitment to reach and attract the appropriate providers. HHA leaders must develop strategies to address challenges to recruit and retain talented providers as healthcare organizations are all recruiting for the same healthcare professionals.

Leaders must be forward thinking in the strategies they implement, such as bonuses, loan forgiveness plans, and incentive plans to demonstrate the value proposition on why healthcare professionals should join a specific organization. PC1 said, “ You need a champion to deliver the message around the recruitment and retention strategies to the communities to provide a level of success around the strategies.” The findings are consistent with Abelsen et al. (2020), who described the challenge around recruiting and retaining a skilled workforce across a rural landscape, including complex factors such as (a) socio, (b) political, and (c) economic influences on how a healthcare provider chooses an organization to work. The participants in the research identified challenges around the socio and economic influences to recruit talented professionals, and they developed strategies to recruit healthcare providers in specific geographical

areas such as targeted marketing and business development efforts on recruitment bonuses for specific clinical professions such as registered nurses.

Theme 3 relates to Kaplan and Norton's (1992) balanced scorecard theory. Guttler et al. (2021) explained how the BSC theory measured, documented, and managed organizational activities through the vision and strategy of leaders related to decisions made to enhance operational performance. The research presented in this study demonstrates how Theme 3 relates to understanding how organizations measure, document, and manage specific key metrics around recruitment and retention strategies to enhance operational performance; therefore, is critical to the success of strategies home healthcare leaders maintain sustainability. The analysis presented in Theme 3 discussed the importance of strategies to address the challenges in attracting talented healthcare professionals. Healthcare organizations are aiming for the same healthcare professionals, which has created challenges to recruit and retain employees. However, key areas of focus to manage recruitment and retention strategies by HHA leaders continues to concentrate on how value propositions can be established to enhance organization presence, but also to develop strategies such as (a) innovative compensation models, (b) incentive plans, (c) flexible schedule, or (d) work/life balance strategies in specific geographical areas to enhance operational performance and maintain sustainability.

Applications to Professional Practice

I demonstrated in my research findings that HHAs who have successfully implemented strategies to maintain sustainability had improved operational performance. In concurrence with the conceptual framework and the literature review, the results from

my study provide HHA leaders the knowledge around strategic thinking that has improved operational performance and maintained sustainability. Businesses use performance measurement tools such as the balanced scorecard methodology to manage financial and nonfinancial indicators to understand and verify the barriers of business activities affecting operational performance (Balogova et al., 2020). The findings from my research may be valuable to HHA leaders in the future, focusing on improving operational performance and developing strategies to maintain sustainability.

The themes developed from my research indicated strategies around data analytics, the diversification of reimbursement, and the effectiveness of recruitment and retention to achieve positive operational performance and maintain sustainability. For example, the balanced scorecard concept is one of the most successful approaches to managing performance measures. It provides advantages to organizations managing business operations such as (a) selecting achievable goals, (b) scenario building, and (c) policy analysis to also apply concepts around key performance indicators (Rabiehet al., 2019). In addition, Concannon et al. (2020) described the value of digital data dashboards as an essential tool to provide management with information to track trends and keep key indicators on track to improve operational outcomes. Fortunately, the implementation of strategies outlined to support the themes identified through my research proved to be a valuable tool to HHAs in maintaining sustainability.

The results did provide a business challenge that HHAs are facing around managing turnover rates related to clinical staff in the healthcare industry. The most critical barrier to recruitment strategies is the lack of time for additional tasks limiting the

capacity to manage patients (Alayli et al., 2021), and with the COVID-19 pandemic; the conditions have intensified the distress of healthcare workers, allowing talented professionals to leave the industry (Rangachari & Wood, 2020). However, based on my results, the five participants explained the strategies implemented to successfully maintain sustainability, including plans to support the three themes presented within my findings.

The first theme identified enhanced performance through the management of data analytics, where HHA used the balanced scorecard methodology of internal processes through data analytics and developing dashboards to manage key performance indicators to monitor and manage business activities. Then, the second theme was the diversification of reimbursement, where HHA used the balanced scorecard methodology perspective of financial to understand gross margins by using analytics to develop strategies to diversify reimbursement to maximize gross margin to maintain sustainability. The third theme was effective recruitment and retention strategies. HHA used the balanced scorecard methodology of learning and growth to identify the barriers around employee retention and develop strategies around recruitment and retention such as recruitment and retention bonuses to attain or retain talented employees. In my study, I illustrated the approach used by HHAs who have successfully implemented strategies to support the themes identified through the research, in conjunction with the balanced scorecard concepts to maintain sustainability.

Implications for Social Change

Organizational leaders can use the three themes mentioned in the study to develop strategies to implement into operations to maintain sustainability. All five participants in my research revealed strategies to support the three themes to maintain sustainability; therefore, providing assurance home health services would continue to be delivered to patients in local communities. Kolakowski et al. (2021) discussed how COVID-19 disrupted lives, such as how individuals take care of vulnerable patients in our communities; therefore, the research illustrates the importance of managing patient's healthcare in the home setting while continuing to be innovative on how HHAs provide quality care. The results from my research suggest that the development of strategies to improve operational performance would provide support to HHAs and benefit the patients who require home health services. HHAs implementing the strategy from the research properly would lead to better outcomes for patients and reduce re-hospitalization rates for local hospital systems. Based on the literature review and the findings of this study, HHAs could improve operational performance and maintain sustainability with a successful implementation of performance management tools and strategies. Using participant strategies allows the possibility to enhance positive outcomes operationally by focusing on patient care, which would benefit our communities.

The results from my research revealed that with appropriate strategies and the implementation of the balanced scorecard concept, HHAs can focus on providing services to patients in communities that require home healthcare services. As mentioned earlier in the research, from 2013 to 2018, 1,142 HHAs closed in the United States

(CMS, MDCR Provider 1 2020).; therefore, HHA must develop strategies to maintain sustainability and remain open to continue providing healthcare services to patients in their homes. In addition, corporate social responsibility plays an essential role in an organization supporting economic and social development, benefiting society, and influencing communities (Asiaei & Bontis, 2019). The results from my study could help other HHAs implement the correct strategies to successfully maintain sustainability, therefore, organizational leaders could provide patients in communities with the appropriate healthcare services and improving patient outcomes.

Recommendations for Action

My research identified strategies some HHA leaders in the Northeast United States used to maintain sustainability. The findings provided evidence on how strategies influenced operational performance to maintain sustainability. I was able to identify three key themes that current and future HHA leaders can use to develop strategies to maintain sustainability. The first theme, which was to enhance performance through data analytics management, is an area that HHAs need to focus on to ensure that leaders understand key performance indicators through the development of dashboards. The development of dashboards is an essential task for HHAs to understand data analytics and improve operational performance. Analyzing financial KPIs monthly is a strategy to monitor performance through dashboard management and linking strategic management to operational objectives (Guttler et al., 2021). Leaders must use strategic tools to manage data analytics to understand how data can be used to support strategies to maintain sustainability.

Regarding the second theme, diversification of reimbursement, HHAs can address strategies to maintain sustainability through enhancing the organization's revenue stream to improve operational performance. HHAs can assess the revenue stream to understand the opportunities they have to diversify and add new services to enhance services such as telehealth services. The third theme, effective recruitment and retention strategies, HHAs can anticipate future concerns around workforce issues and develop recruitment and retention strategies to enhance success. Organizational leaders can create a plan to address workforce issues through strategic thinking and outreach to recruit new and retain current clinical staff. HHA can also modify strategies around recruitment and retention and promote bonuses, loan forgiveness programs, and performance improvement compensation strategies.

HHA leaders could benefit from understanding the results of this research study because it illustrates strategies to support themes HHAs use to maintain sustainability successfully. HHA should use these strategies to enhance operational performance and maintain sustainability; however, HHAs can also use this research to develop strategies to improve how they manage patients by understanding how data analytics or additional services like telehealth can provide robust patient outcomes. Healthcare professionals outside of the home healthcare industry could also benefit from analyzing the study results to understand the importance of data analytics, enhanced focus on reimbursement, and development of strategies to address workforce concerns. Furthermore, HHA leaders should identify difficulties in managing operational performance by understanding what affects performance, allowing leaders to guide fiscal responsibility around sustainability.

As the researcher, I am committed to presenting my research findings to home healthcare industry leaders to help enhance organizational practices to maintain sustainability. I also believe submitting my results to professional journals would benefit organizational leaders on how to develop strategies to preserve sustainability and link strategies with my conceptual framework: the balanced scorecard concept.

Recommendations for Further Research

Limitations in the current study indicate opportunities for future research. For example, one limitation I identified during my research was the limits related to the geographical location as the results from my study focused on research around HHAs in the Northeast United States. For this reason, I recommend researchers conduct future research in other geographical locations around the United States to understand how HHA leaders develop strategies to maintain sustainability. Furthermore, researchers could use findings to compare how leaders from different geographical areas develop strategies to maintain sustainability.

The second limitation I identified was researchers need to conduct further research on how services are provided in rural areas of the United States to maintain sustainability. For example, one future variable researcher should consider how HHAs enhance operational performance with the increased costs in providing services to patients in rural areas; however, HHAs must understand how reimbursement changes to rural areas of the United States affect operational performance. Moreover, researchers could explore additional strategies HHA leaders develop to establish innovative ways to

provide services to patients in rural areas to enhance operational performance while showing an effective performance management tool.

Another limitation in my research study was how the participants explained how they manage around operational performance strategies to maintain sustainability. The participants did not mention how strategic planning could enhance how strategies are analyzed to mitigate the future risk of operating performance. Therefore, the interpretations and business practices differed on how the HHA runs its operations, and the expertise was not the same across all organizations. Future researchers could explore how participants' expertise varied, affecting how HHAs maximized outcomes in the strategic planning process to develop balanced scorecards to achieve sustainability and enhance the strategic planning practices. HHA could benefit from this further research to explore how strategic planning could enhance operational performance as a management tool to maintain sustainability.

Reflections

The purpose of my research study was to identify strategies some HHA leaders used to maintain sustainability. I engaged in this research topic because of my experience developing strategies in the home healthcare industry. As an HHA leader, I witnessed organizational strategy development in the industry that did not use data analytics to enhance operational performance or focus on diversifying reimbursement to maintain sustainability. I had my personal opinions on developing strategies to improve operational performance; I had to remove my biases while conducting interviews with participants. My attempt to find participants was not difficult as the participants

genuinely found the research study stimulating and beneficial to the home healthcare industry. I did experience times of feeling overwhelmed due to the amount of time spent on the research study and how to align my research findings to my conceptual framework effectively; however, I found the importance in the study as I spoke with the participants about the strategies they used maintain sustainability.

After conducting my research study, I understood how HHA leaders found it difficult to develop strategies while managing the external factors affecting operational performance, such as the COVID-19 pandemic and the workforce issues the healthcare industry faces daily. After conducting the interviews with the participants, I found that I could support HHA leaders with understanding the importance of developing and implementing strategies to maintain sustainability. The participation of the HHA leaders in the research study helped the participants understand the value and align strategies to maintain sustainability.

Conclusion

The purpose of this qualitative multiple case study was to identify strategies some HHA leaders used to maintain sustainability. My research focused on five HHA leaders who successfully implemented strategies to maintain sustainability. In my study, the HHA leaders demonstrated that strategy focused on data analytics, diversification of reimbursement, and effective recruitment and retention plans could have positive operational performance implications. Therefore, patients and communities could benefit as HHAs continue to provide exemplary home healthcare services. The BSC model aligned with strategies to enhance operational performance provides HHA leaders

opportunities to identify the validity of organizational strategies to maintain sustainability. With the rapid changes in-home healthcare regulatory environment and the external forces around the pandemic, leaders must continue to assess organizational needs and align strategies to the BSC methodology. Home healthcare services provided in areas of need are vital to patients in our communities, especially in the healthcare environment under the COVID-19 pandemic.

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Appendix A: Interview Protocol Form

Interview Title: Exploring home healthcare leaders' lived experiences related to strategies in achieving and maintaining sustainability.

1. The interview will start with greetings and an introduction to the purpose of the research.
2. The participants will have previously received and read the informed consent form and provided a signed consent via e-mail, agreeing to participate in the study. I will thank the participant for agreeing to contribute to the research study. I will provide additional information on the member checking process that will commence after the transcription and interpretation of the interview data. Following the transcription of the gathered responses, I will connect with participants to walk through the member checking procedures to ensure the information's reliability and validity.
3. I will provide the participants a paper copy (and electronic copy) of their records' informed consent.
4. I will turn on the device used to record the interview; at this time, I will note the time, date, and location.
5. I will indicate the coding used to deidentify the participant, such as 'PC1' on the recording, which I will document on the consent form and begin with the interview.

6. I will provide each participant with enough time to answer the predetermined interview question in detail, including any additional questions per the semistructured interview method.
7. At the end of the interview, I will thank the participant for their time and consideration of the research study.