

THE OWNER DEPENDENCY SCORECARD™

Could Your Home Care Agency Run for 7 Days Without You?

A 5-MINUTE ASSESSMENT FOR HOME CARE AGENCY OWNERS

Discover where your agency depends too heavily on YOU — and identify the systems and SOPs you need to build first.

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Home Care Business Strategist

How This Works

You'll answer 20 quick statements across 5 core areas of your agency. For each one, rate how TRUE it is on a scale of 1 to 5:

1	Never true — 100% depends on me
2	Rarely true
3	Sometimes true
4	Usually true
5	Always true — runs without me

Be honest, not aspirational. This scorecard only works if you rate where your agency actually is today — not where you hope it will be.

Add up your total score at the end and turn to the Your Results page to see where you land and what to do next.

The Assessment

1. Client Care & Service Delivery

1. My care coordinators/schedulers can resolve a client complaint without involving me.

Score: 1 2 3 4 5 (circle one)

2. New client intakes and assessments can be completed by someone other than me.

Score: 1 2 3 4 5 (circle one)

3. Care plans are created and updated using a standard template or process — not from my memory.

Score: 1 2 3 4 5 (circle one)

4. If a client called today with an urgent need, someone other than me could handle it start to finish.

Score: 1 2 3 4 5 (circle one)

2. Staffing & Caregiver Management

5. I have a written onboarding process for new caregivers that someone else can run.

Score: 1 2 3 4 5 (circle one)

6. Caregiver scheduling and shift coverage happens without me stepping in.

Score: 1 2 3 4 5 (circle one)

7. Someone else can interview, hire, and onboard caregivers without my involvement.

Score: 1 2 3 4 5 (circle one)

8. My team has a documented protocol for handling caregiver call-outs or no-shows.

Score: 1 2 3 4 5 (circle one)

3. Sales & Client Acquisition

9. Someone else can run a pricing/consultation call with a prospective client the way I would.

Score: 1 2 3 4 5 (circle one)

10. My referral partners have a real relationship with someone at my agency other than me.

Score: 1 2 3 4 5 (circle one)

11. I have a documented sales script or process a team member could follow to close a new client.

Score: 1 2 3 4 5 (circle one)

12. New leads are followed up with automatically or systematically — not manually by me.

Score: 1 2 3 4 5 (circle one)

4. Financial & Administrative Operations

13. Someone else reviews and approves invoicing/billing without my sign-off.

Score: 1 2 3 4 5 (circle one)

14. My bookkeeping and financials live in a system — not in my head or a spreadsheet only I understand.

Score: 1 2 3 4 5 (circle one)

15. Payroll can run on schedule even if I'm unreachable for a week.

Score: 1 2 3 4 5 (circle one)

16. I have documented SOPs for the core financial processes in my business.

Score: 1 2 3 4 5 (circle one)

5. Marketing & Growth

17. My marketing/content calendar can be executed without me creating everything personally.

Score: 1 2 3 4 5 (circle one)

18. Someone else manages my social media presence and can post without my daily input.

Score: 1 2 3 4 5 (circle one)

19. I have written SOPs (not just knowledge in my head) for how new team members learn their role.

Score: 1 2 3 4 5 (circle one)

20. If I took a full week off with no phone access, my agency's revenue-generating activities would continue as normal.

Score: 1 2 3 4 5 (circle one)

Your Results

Add up all 20 scores for your TOTAL SCORE:

TOTAL SCORE: _____ / 100

20-46 | RED ZONE

The Indispensable Owner

Your agency currently depends almost entirely on you. Without you in the day-to-day, care could be disrupted, revenue could stall, and your team would be stuck waiting on decisions only you can make.

This isn't a failure — it's the normal stage every owner-operated agency passes through. The next step is building the core SOPs and delegation systems that let your team run without you in the room.

47-73 | YELLOW ZONE

The Transitioning Owner

You've built real systems in some areas of your agency, but there are still gaps — likely in sales, financial operations, or marketing — where everything still funnels back to you.

You're closer to freedom than you think. The fastest wins come from documenting the 2-3 processes still living only in your head.

74-100 | GREEN ZONE

The Freedom-Ready Owner

Your agency has real infrastructure. Your team can carry the day-to-day, and you're positioned to step back, scale, or take time off without the business grinding to a halt.

The next stage isn't about building more SOPs — it's about tightening and scaling the systems you already have.

READY TO BUILD YOUR OWNER FREEDOM SYSTEM?

Wherever you landed on this scorecard, you don't have to build the systems alone.

JOIN THE OWNER FREEDOM FRAMEWORK WORKSHOP

September 24, 2026

A live working session to help you identify the exact systems and SOPs your agency needs to run without you — using your own Scorecard results as the starting point.

[REGISTER FOR THE WORKSHOP →](#)

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30 years as a Registered Nurse. 20+ years as a Healthcare Administrator. Home Care Business Strategist.