Optimizing PACE Summit

Adapting Continuous Improvement Principles to Optimize PACE Operations and Efficiencies

December 8–9, 2016
Hyatt Regency • Fort Lauderdale, FL

www.npaonline.org/optimizing-PACE
ABOUT THE SUMMIT

Background

The National PACE Association (NPA) launched the Optimizing PACE Operations and Efficiencies (OPOE) project last year to explore PACE operational efficiencies and enhancements. This was done by creating a learning collaborative consisting of NPA; NOVACES, a performance improvement consulting firm; and five PACE organizations: ArchCare Senior Life in New York, NY; Bienvivir All-Inclusive Senior Health in El Paso, TX; Midland Care Connection in Topeka, KS; NewCourtland Senior Services in Philadelphia, PA; and PACE Organization of Rhode Island in Providence, RI.

The organizations worked with NOVACES using Lean and Six Sigma methodologies, coupled with the Theory of Constraints, to undertake efforts to identify and put in place improved operational practices. The PACE organizations that participated invested a significant amount of time and resources into rigorously applying Lean and Six Sigma to PACE in an effort to improve their organizations’ efficiency and overall performance. Through the projects, staff from each organization worked to achieve Lean Six Sigma Green Belt certification for enhanced problem-solving skills.

During this NPA members-only event, attendees will learn about the experiences of the five PACE organizations in their efforts to optimize PACE. Presenters from each of the organizations will showcase the results of their work, candidly discuss what they learned, and share their results, as well as their challenges. The presenters also will share the value of learning a systematic approach to performance improvement and how it can be applied to PACE.

The goal of the event is to provide attendees with a brief introduction to Lean, Six Sigma, and the process of developing a Green Belt in PACE; discuss the work that each site performed; provide a toolkit of resources for PACE organizations; and offer other PACE organizations the chance to participate in a second iteration of the project in 2017.

The target audience for the Optimizing PACE Summit is personnel focused on improving the quality and efficiency of PACE operations. PACE CEOs, COOs, CMOs, CFOs, quality directors, and center directors in particular will find this conference useful. NPA recommends sending three individuals from each organization to participate in the interactive summit.

Don’t miss this exciting, first-of-its-kind educational and organizational development opportunity. The conference attire is casual dress.
ADAPTING CONTINUOUS IMPROVEMENT PRINCIPLES TO OPTIMIZE PACE OPERATIONS AND EFFICIENCIES

AGENDA

Thursday, Dec. 8

7-8 A.M.
REGISTRATION AND BREAKFAST

8-9 A.M.
WELCOME AND OVERVIEW OF THE PROJECT
Shawn Bloom, President and CEO, NPA

9-10 A.M.
LEAN AND SIX SIGMA OVERVIEW
Marliese Bartz, Consultant, Lean Six Sigma Black Belt and Kaizen Leader, NOVACES, New Orleans, LA
Edward Vasco, Consultant, ASQ-Certified Six Sigma Master Black Belt and Lean Practitioner, NOVACES, New Orleans, LA

10-10:30 A.M.
BREAK

10:30-11:30 A.M.
CASE STUDY 1: STREAMLINING THE OUTSIDE SCHEDULING PROCESS
James Baca, Vice President, PACE Center Operations, Bienvivir
Ernesto Fernandez, IT Data Analyst, Bienvivir
Delia Gutierrez, MD, Medical Director, Bienvivir
Naomi Olivas, PACE Center Director, Bienvivir

11:30 A.M. to 1 P.M.
NETWORKING LUNCHEON

1:15-2 P.M.
CASE STUDY 2: IMPROVING AND ADHERING TO GRIEVANCE POLICIES
Mary Austin, Vice President, Health Services, NewCourtland Senior Services
Mary Capella, Director, Quality and Compliance, NewCourtland Senior Services
Dorit Contento, Health Information Analyst, NewCourtland Senior Services
Lisa Santilli, Director, Quality Improvement and Staff Development, NewCourtland Senior Services

2-2:30 P.M.
BREAK

2:30-3:30 P.M.
CASE STUDY 3: SMOOTHING OUT CARE PLANNING BUMPS
Pauline Bourassa, Quality and Regulatory Specialist, PACE Organization of Rhode Island
Linda Gilbert, Chief Financial Officer, PACE Organization of Rhode Island
Maryellen Girard, Health Center Manager, PACE Organization of Rhode Island

3:30-5 P.M.
CASE STUDY 4: NEW ENROLLEE RETENTION PROJECT FROM TWO PROGRAM PERSPECTIVES
Bushra Hashmi, Quality Facilitator, Midland Care Connection
Harmony Hines, Vice President, Compliance, Midland Care Connection
Karen Knappenberger, Social Work Coordinator, Midland Care Connection
Greg Reser, Vice President, Senior Services, Midland Care Connection
Henriette Kole, Executive Director, PACE, ArchCare Senior Life
Gina Morgan-Faccioli, Director, Education and Clinical Standards, ArchCare Senior Life
Lynda Piraino, Program Manager, ArchCare Senior Life
Susanna Pitzer, Recreation Therapist, ArchCare Senior Life

5-5:30 P.M.
RECAP
Peter Fitzgerald, Executive Vice President, Policy and Strategy, NPA
Sam Kunjukunju, Director, Project Management, NPA

6:30-8 P.M.
WELCOME RECEPTION AND GREEN BELT RECOGNITION CEREMONY

Friday, Dec. 9

7:30-8:30 A.M.
BREAKFAST AND NETWORKING

8:30-9:45 A.M.
OVERVIEW OF THE DAY AND PANEL DISCUSSION
NOVACES and Optimizing PACE Learning Collaborative

9:45-10 A.M.
BREAK

10-11:30 A.M.
GROUP EXERCISE: SKILL BUILDING
Marliese Bartz, NOVACES
Edward Vasco, NOVACES

11:30 A.M. - 12:30 P.M.
TOOLKIT AND NEXT ITERATION
Marliese Bartz, NOVACES
Edward Vasco, NOVACES
Shawn Bloom, NPA

12:30 P.M.
ADJOURNMENT
PROJECT OVERVIEW

The summit features presentations by the five PACE organizations in the Optimizing PACE Learning Collaborative.

ArchCare Senior Life (New York, NY)
ArchCare worked to improve member retention. The organization focused on analyzing voluntary disenrollments during two time frames: within the first 30 to 60 days and less than six months.

Summit attendees will learn about the underlying challenges that ArchCare observed and how they were addressed, the methods that were developed to improve the first day of new participants, and how the organization continues to improve the process.

About ArchCare: ArchCare began PACE in 2009 and currently provides care for more than 450 people. ArchCare works to enhance the lives of elders and others who need extra help to stay healthy and live life to its fullest by providing care at home, in the community, and in nursing homes in New York City.

Bienvivir All-Inclusive Senior Health (El Paso, TX)
The Bienvivir executive staff and project team members addressed the process of scheduling appointments with outside specialists. With more than 100 new medical orders generated daily, it became critical for Bienvivir to address scheduling process inefficiencies by streamlining the scheduling process, improving inter-departmental communication, and reducing scheduling rework in the form of canceled or rescheduled appointments.

Summit attendees will learn how the Bienvivir OPOE team utilized Six Sigma/Lean tools, methodologies and practices to develop short- and long-term initiatives that vastly improved the scheduling process and organizational communication and helped facilitate a more productive and efficient work environment.

About Bienvivir: Established in 1986, the organization provides comprehensive health services to more than 900 participants at three centers in El Paso. In addition to interdisciplinary health care, Bienvivir offers a 40-bed Alzheimer’s Care Unit, an in-house pharmacy, and ancillary services such as medical appointment scheduling and escort and transportation assistance.

Midland Care Connection (Topeka, KS)
Midland Care Connection focused on improving participant retention in an effort to reduce voluntary disenrollments. A review of two years of data revealed a high voluntary disenrollment rate, particularly during the first 90 days. The organization reviewed every aspect of the enrollment process and follow-ups post enrollment.

Summit attendees will learn about the outcomes achieved to date, including organizational cost savings, increased staff morale, and better enrollee retention and satisfaction.
About Midland Care: The organization has been providing end-of-life and senior care to the communities of northeast Kansas for more than 35 years. The PACE program began in 2007 and currently serves over 200 participants at three sites.

**NewCourtland Senior Services (Philadelphia, PA)**

Early this year, NewCourtland noted that it was not following its own grievance policy. The result was an outstanding number of grievances not being resolved in a reasonable period of time. The organization engaged in a process to address systemic challenges, improve staff comfort with technology, remove the stigma associated with grievances, and promote staff buy-in.

Summit attendees will learn about the steps taken by NewCourtland to improve its grievance policy, the challenges it faced, accomplishments, and its aim to resolve grievances within a five-day period.

About NewCourtland Senior Services: The organization, which opened in 2007 in Philadelphia, now serves more than 450 participants in three centers and continues to grow.

**PACE Organization of Rhode Island (Providence, RI)**

The PACE Organization of Rhode Island sought to streamline its process for scheduling appointments related to care plan assessments, ensure that assessments were completed on time to avoid rescheduling, and improve the overall flow of the health center.

Summit attendees will learn about the root causes of care plan “bumps,” the interventions put in place, and details of the progress made by the organization toward its goals.

About PACE Organization of Rhode Island: The organization opened its doors in 2005 and currently serves more than 280 participants at three sites, providing access to 99 percent of residents in the state.

**ABOUT NOVACES**

NOVACES, LLC (NOVACES) is a small business firm specializing in the practical application of systematic approaches to identifying operational and cost variances, including Lean, Six Sigma, Kaizen, Critical Chain, Achieving Competitive Excellence, Statistical Process Control, and other methodologies in the health care industry. A book developed by the firm, titled *Performance Improvement for Healthcare*, is regarded as one of the most comprehensive guides to health care process improvement available today. Prior to working with PACE organizations in the OPOE project, the experiences of NOVACES largely involved working with major medical military, government and commercial health care system domains to implement and lead organizational improvements and cultural changes. For example, NOVACES implemented Lean and Six Sigma for Navy Medicine, one of the largest, enterprise-wide military health care process improvement implementations. With a unique mix of veteran, military and commercial health care experience, the firm is dedicated to leveraging best practices across these diverse health care environments. NPA is pleased to have contracted with NOVACES to support the Optimizing PACE Learning Collaborative.
FORT LAUDERDALE

A cosmopolitan city located in the heart of South Florida, Greater Fort Lauderdale boasts 23 miles of beaches and abundant sunshine. The family-friendly destination offers a variety of upscale shopping options, a wide range of international cuisine, beautiful beaches and daily excursions. Offerings include luxury spas, casinos and golf courses.

Things to Do

- Arts and Entertainment: The Riverwalk Arts and Entertainment District in downtown Ft. Lauderdale features restaurants, shops and cultural attractions.
- Boat Tours: Explore the intracoastal waterway and Millionaires Row by Jungle Queen Riverboats and Water Taxi™.
- Everglades National Park: Enjoy beautiful scenery and nature.
- Historical City Tour: See the “Venice of America” aboard Riverfront Cruises.
- Las Olas Boulevard: Boutique shopping, restaurants and entertainment.
- Outlet Shopping: SawGrass Mills.
- Restaurants: Indian Harbor, Kitchen Four Twenty, La Bamba.

For more information, visit the Greater Fort Lauderdale Convention & Visitors Bureau website.

THE HOTEL

Hyatt Regency

The beautiful Hyatt Regency Pier 66, at 2301 SE 17th St. in Fort Lauderdale, sits on 22 acres of tropical waterfront with a bustling entertainment district nearby. The family-friendly hotel features five restaurants and bars, spas, waterfall pools and an oversized hot tub. Snorkeling, glass-bottom boat trips and other aquatic rentals can be arranged. The Hyatt Regency is minutes away from the beach by shuttle and just three miles from the Fort Lauderdale-Hollywood International Airport.

Online reservations are available, or call 888-421-1442. Mention that you will be attending the OPOE Summit and reference the code NPA when making reservations. The single/double occupancy rates, plus applicable taxes and fees, are $149 for marina/pool view or $169 for tower/balcony view. The resort fee has been waived. Also included in these special contracted rates are complimentary fitness center access, guestroom and lobby Wi-Fi, and a daily beach shuttle. The reservation deadline is Nov. 16.
Getting There and Around

Ground transportation from the Fort Lauderdale-Hollywood International Airport (FLL):

- Rental Cars: You can rent a car at the airport. Avis is on site at the Hyatt.
- Super Shuttle: Approximately $10 each way.
- Taxis: Approximately $20 each way.
- Uber: Approximately $10 each way.

Parking rates at the Hyatt are $11 for daily parking, $25 for overnight self-parking, and $30 for overnight valet parking.

Local transportation:

- Complimentary Beach Shuttle: 9:30 a.m. to 5:30 p.m. daily.
- Sun Trolley ($1): Easy access to 17th Street, every 15 minutes to the beach, every 30 minutes to Las Olas Boulevard.

REGISTRATION INFORMATION

How to Register

By Mail
Mail your registration form and check to:
National PACE Association
675 N. Washington St., Suite 300
Alexandria, VA 22314

By Fax
For payment by credit card only, fax form to 703-535-1566. Registration will not be processed without payment.

Early Registration

The early-bird registration deadline is Nov. 21.

Registration Rates (NPA Members Only)

Early-Bird (by Nov. 21): $475
Regular (after Nov. 21): $550

What’s Included

The registration fee includes a welcome reception, two breakfasts, three breaks and one lunch.

Cancellations

Refunds will be processed for the summit if written cancellation is received by fax (703-535-1566) or email no later than Nov. 21. No refunds will be issued after that date. If you decide to send a substitute, please notify NPA by Dec. 5.

For more information about registration, contact Rhonda Rose or 703-535-1569.
2016 OPTIMIZING PACE SUMMIT REGISTRATION FORM

First and Last Name ____________________________________________ Nickname (for Badge) ____________________________________________

Title __________________________________________________________________________ Organization ____________________________

Business Address ____________________________________________________________________________________________________________

City ____________________________________________ State ____________________________ Zip Code ____________________________

Phone ____________________________ Fax ____________________________ Mobile (for Onsite Contact) ____________________________

Email ____________________________________________

Emergency Contact ____________________________________________ Phone ____________________________________________

☐ NPA is committed to making meetings accessible to all participants. Check here if you need special consideration and would like NPA to contact you for details.

Please indicate if you require special meals:  ☐ Kosher  ☐ Vegetarian  ☐ Gluten-Free  ☐ No Pork
☐ Other ____________________________________________  ☐ Food Allergy ____________________________________________

Should you experience an allergic reaction, what is your plan of action? ____________________________________________

☐ Please do not share my contact information with sponsors/vendors.

Registration (Check One)
☐ $475 Early-Bird Registration (Payable by Nov. 21)
☐ $550 Regular Registration (Payable after Nov. 21)

Discipline/Primary Area of Responsibility (Check One)

☐ Administration  ☐ Intake/Marketing  ☐ QI/QA
☐ Center Director  ☐ Medical Director  ☐ Rehab/Therapy
☐ Clinical Service  ☐ Nurse  ☐ Social Worker
☐ Consultant  ☐ Nurse Practitioner  ☐ Vendor
☐ Financial  ☐ Physician  ☐ Other

Method of Payment

☐ Check/Money Order (Payable to NPA)  ☐ VISA  ☐ MasterCard

NPA does not accept American Express or Discover Card.

Card Number ____________________________________________ Expiration Date ____________________________________________

Name of Cardholder (Please Print) ________________________________________________________________________________

I authorize NPA to use the above credit card to charge applicable fees.

_________________________________________    ______________________
Authorized Signature    Date

Return Form and Payment to:
National PACE Association, 675 N. Washington St., Suite 300, Alexandria, VA 22314
Fax: 703-535-1566 (for Credit Card Payment Only)  •  Phone: 703-535-1569

ADAPTING CONTINUOUS IMPROVEMENT PRINCIPLES TO OPTIMIZE PACE OPERATIONS AND EFFICIENCIES