



# UNDERSTANDING PACE

## New PACE Providers: The Path from Interest to Start-Up

Organizations make the choice to develop PACE programs based on a thorough decision-making process. Past experience tells us that PACE programs pass through three general phases in completing this process.

1. Understanding the PACE Model
2. Organizational Assessment and Decision-Making
3. Planning and Development/PACE Provider Application

This guide is designed to help organizations navigate through each of these distinct phases, identify what they should be accomplishing in each phase and access educational and technical assistance resources available to assist them. Each phase is explained in this guide through objectives, activities, milestones and resources particular to that stage of decision-making.

Developing a PACE program requires a sound understanding of the model. The National PACE Association (NPA) and PACE Technical Assistance Centers (TACs) are available to provide the necessary expertise, support and counsel through the developmental phases. This guide provides a framework for thinking about how organizations move through the process of planning a new PACE program.

The last part of the guide describes how the interested organization translates its plan into actual care provision. Throughout the entire process, NPA and the TACs are ready to assist providers.

If you have any questions, please call NPA at (703) 535-1517. For further information regarding TACs please visit our web site at [www.NPAOnline.org](http://www.NPAOnline.org). Understanding the PACE Model

## First Stage

# Understanding the PACE Model

## OBJECTIVES

1. Gain an understanding of the PACE model's program and service requirements.
2. Understand scope and extent of current PACE experience.
3. Understand the stages of development for initiating a new PACE program.
4. Assess availability and cost of resources to assist in decision-making and start-up.

## ACTIVITIES

1. Acquire and review information about the PACE model and PACE providers.
2. Assemble internal work group/team.
3. Establish a timeline and workplan for completing a self-assessment.

## TECHNICAL ASSISTANCE OPPORTUNITIES

Prospective PACE providers can benefit enormously from the expertise of existing PACE programs that have had firsthand experience in the development and implementation of PACE. One of the best ways to understand the PACE model is to visit an operating PACE program. Technical Assistance Centers can arrange these site visits as well as initial on-site presentations and assessment.

## FIRST STAGE MILESTONE

Based on its understanding of the PACE model and internal interest, the organization receives commitment from its governing body to complete the self-assessment.

## Resources for Development

### PUBLIC RESOURCES

1. NPA Membership Brochure
2. PACE Program Fact Sheet
3. NPA Calendar of Events
4. PACE FAQs
5. Program of All-inclusive Care for the Elderly (PACE) Fact Sheet
6. National PACE Association (NPA) Fact Sheet
7. PACE in the News
8. Developing PACE Education Series Library
9. An Overview of Self-Assessment Considerations

## Second Stage

# Organizational Assessment and Decision-Making

## OBJECTIVES

1. Assess federal and state regulatory requirements and implications for PACE.
2. Describe the organization's critical factors for moving forward and assess the need for outside support.
3. Outline the key questions/factors to be addressed by the decision-making plan.
4. Complete a business plan that will present a recommendation to the organization's governing body.

## ACTIVITIES

1. Gather information and complete self-assessment.
2. Establish a timeline and work plan for developing a business plan.
3. Engage community organizations to assess preliminary response to PACE.
4. Identify state liaison and key agencies.
5. Develop a business plan and present it to the organization's governing body.

## TECHNICAL ASSISTANCE OPPORTUNITIES

One of the first activities an organization will undertake as a part of this decision-making process is an in-depth assessment of whether the community and the sponsoring organization will be able to support and benefit from the development of a PACE program. PACE TACs conduct organizational and market assessments and assist with the development of a business plan and other materials for presentation to the organization's stakeholders and governing body.

## SECOND STAGE MILESTONE

Based on the business plan, the organization commits resources to a timeline and workplan for start-up.

## Resources for Development

### PUBLIC RESOURCES

1. PACE Planning Resource Checklist
2. PACE Program Development Considerations:
  - Organizational and Market Self-Assessment for PACE
  - Sources for Financing
  - Program Start-up and Development Costs
  - An Overview of PACE Site Selection and Center Development
3. Summary of the PACE Provider Regulation
4. Case Studies
5. Business Planning Checklist for New PACE Programs
6. Online, high-level PACE Financial Proforma

### NPA MEMBERSHIP RESOURCES

7. Demographic Report
8. Developing PACE Education Series
9. Exploring PACE List Serve
10. Guide to PACE Site Selection and Center Development

## Third Stage

# Planning and Development/ PACE Provider Application

## OBJECTIVES

1. Secure financing and risk insurance.
2. Obtain approval of PACE provider application to establish PACE provider status with state and federal agencies.
3. Establish effective marketing strategies.
4. Establish an operational day center.

## ACTIVITIES

1. Develop program policies and procedures.
2. Prepare PACE provider application.
3. Identify target audiences for development of referral network.
4. Develop marketing plan and materials.
5. Design, construct and equip PACE day center.
6. Hire and train staff.
7. Select, install and train staff on information system.
8. Establish financial accounting system and procedures.

## TECHNICAL ASSISTANCE OPPORTUNITIES

Once an organization has decided to proceed with PACE, TACs are available to assist with the initial planning and development of the PACE program, including the development of the PACE center, hiring and training center staff, start-up and preparation of the PACE provider application. TACs also provide ongoing consultation once an organization is fully operational and has begun providing services to participants. TACs provide support through telephone consultation, on-site visits, intensive trainings and resource materials.

## THIRD STAGE MILESTONE

PACE provider application is approved and provider agreement signed. Organization is ready to offer services and begins enrolling participants. Day center is operational.

## Resources for Development

### NPA MEMBERSHIP RESOURCES

1. Core Resource Set for PACE (CRSP) - a compendium of PACE program operational resources to assist providers in PACE development and expansion
  - PACE Operating Resources - resources for administering and operating a PACE program
2. Networking list serves
3. Federal and state policy updates & advocacy
4. NPA communications
5. Discounted NPA conference registration fees
6. CMS-sponsored meetings
7. Keeping the PACE newsletter
8. Monthly Educational Teleconference Series

# Looking Ahead: Enrollment and Ongoing Operations

With federal approval of the PACE provider application, and a signed agreement between the organization, the state and the federal government, the program acquires PACE provider status. At this point in the program's development, activities shift from planning to operations. NPA and the Technical Assistance Centers (TACs) continue to provide resources to support the success of new PACE programs as they move into this operational mode.

Early in the program's operations, the organization will need to focus on building its census. During this time it also is important to establish the interdisciplinary care team, systems for integrating services and service allocation. Provider status also requires the establishment of quality improvement mechanisms and readiness for on-site reviews by state and federal agencies.

As the program matures, the PACE program continues to build upon and improve existing operations, increase census and consider plans for future expansion.

The Centers for Medicare and Medicaid Services (CMS) and the state will continue ongoing monitoring of the program. The PACE program will be responsible for meeting evolving state and federal regulatory requirements.

Resources available to start-up and operational PACE programs include:

- Updated and expanded resources for PACE start-up and operations in the Core Resource Set for PACE (CRSP)
- Performance benchmarking for service outcomes, utilization and costs
- Networking list serves
- Federal and state policy updates & advocacy
- NPA communications
- Discounted NPA conference registration fees
- Keeping the PACE newsletter

The National PACE Association (NPA) exists to advance the efforts of Programs of All- inclusive Care for the Elderly (PACE). PACE programs coordinate and provide all needed preventive, primary, acute and long term care services so that older individuals can continue living in the community.

## How NPA Supports PACE Programs

### **PUBLIC POLICY AND ADVOCACY**

NPA works closely with members of Congress, senior administration officials and their staff, and state policy makers to educate and promote a reimbursement and regulatory environment that enables PACE programs to continue to provide high quality, individualized and innovative care.

### **EDUCATIONAL OPPORTUNITIES**

NPA hosts two conferences per year and a bi-monthly teleconference series, so members can learn from one another and from leading experts in the long term care field.

### **START-UP AND OPERATIONAL RESOURCES**

NPA facilitates networking list serves for staff from various disciplines within PACE programs, and produces other communications vehicles to assist developing and operational programs.

NPA members have access to the Core Resource Set for PACE (CRSP), a compendium of resources for PACE program development, expansion and operations.

## **NPA provides guidance and support for a range of policy and operational issues and challenges.**

### **QUALITY ASSURANCE**

NPA collects data from participating PACE programs to help them compare the provision of services and participant characteristics across PACE programs. This benchmarking data is helpful in allowing PACE program staff to continuously improve their delivery of services.

### **RESEARCH**

NPA is committed to supporting the study of innovative and integrated models of care with the goal of improving the lives of seniors and their families, regardless of the health care setting.

*For additional information and assistance, visit the National PACE Association website at [www.NPAonline.org](http://www.NPAonline.org) or a technical assistance center to discuss options for constructing a business plan for PACE.*