



Senior Living Health Care Consultants

1501 Greer Lane, Signal Mountain, TN 37377 • 423.517.0567 • FAX 423.517.0568

www.consulting-cds.com

The following information is provided in response to questions posed by the National PACE Association for the purpose of providing information about the services Continuum Development Services offers to developing and operational PACE organizations. The information is current as of December 2010. Questions may be directed to Dan Gray at dan.gray@consulting-cds.com or 423-517-0567.

1. Which of the following services do you provide?

- Strategic planning
- Demographic market assessments
- Feasibility and Business Plan Development
- Operational improvement
- Program start-up
- Operational support and technical assistance
- Expansion support
- Application development
- Due diligence-acquisition
- Medicare Risk Adjustment

2. What year did your organization begin providing technical assistance for PACE?

Continuum Development Services has been a Technical Assistance Center since 2002.

3. List key employees and describe their experience with PACE (including number of years).

Dan Gray has over 25 years experience as a health care executive with nationally recognized health systems. Mr. Gray began his consulting practice in 1988 to provide senior services organizations with operational auditing, management consulting services, and development of community-based services such as the Program for All-Inclusive Care for the Elderly (PACE) and Life Care at Home (LCAH). During Mr. Gray's career with a large Chicago-based health care system, he was responsible for the development and operations of two PACE centers in Chattanooga and St. Louis. In 2002, Mr. Gray established Continuum Development Services (CDS) and he has worked with more than 100 providers across the country.

He regularly provides his expertise on projects with the industry's leading accounting firms and is a past Board member of three provider associations serving seniors: American Association of Homes and Services for the Aged (AAHSA), National PACE Association (NPA) and Catholic Health Association (CHA). He is a frequent speaker at industry conventions and forums such as AAHSA, Ziegler, and National PACE Association conferences.



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Mr. Gray has a Master of Science in Long Term Care Administration from the University of North Texas and a Master's Certificate in Gerontology from the University of Southern California. He is a Licensed Nursing Home Administrator in the State of Tennessee.

Vicki Guertin has worked in the healthcare field for over 25 years with a strong clinical background. She has over 16 years of supervisory, management and budget administration experience. Ms. Guertin serves as clinical consultant to Continuum Development Services and specializes in PACE operations and training.

Ms. Guertin has been the Administrator of Alexian Brothers Community Services of Chattanooga since the beginning of the program. During start-up of the program, Ms. Guertin recruited the Team, conducted in-home visits and enrolled the first 40 participants. Ms. Guertin manages the day-to-day operations of the program, which has over 300 participants and 150 employees. She also participated in the successful completion of the CMS application to become a permanent Medicare provider.

She is currently a member of the Advisory Board for the Social Work and Family Studies Program at Southern Adventist University and has served as the President of the Director of Nursing Association and the Professional Nurse Council.

Kevin Mulhearn has over 20 years experience as a health care professional with nationally recognized health systems. Mr. Mulhearn works with Continuum Development Services on a contract basis and provides assistance on PACE operational reviews and development of PACE financial models.

Mr. Mulhearn's experience includes serving as Chief Financial Officer of a major Chicago-based health system where he was responsible for financial management and oversight and strategic planning of all Elderly Ministries, including PACE. Mr. Mulhearn is currently working with a large Virginia-based health system, which operates two PACE centers and is in the process of expanding the program.

Mr. Mulhearn is a member of the CARF-CCAC *Financial Advisory Panel (Commission of Accredited Rehabilitation Facilities and Continuing Care Accreditation Commission)*. He has a Master of Business Administration (concentration and health care management) from Lewis University and a Bachelor of Arts in Accounting from North Central College.

Cyndi Young is a Registered Nurse who has worked in the healthcare field for over 20 years. Ms. Young has a strong background in home health and development of QI policies and procedures.



Catherine McKenzie has worked in the healthcare financial management field for over 16 years. She has a background in hospital finance as well as PACE finance. Ms. McKenzie is responsible for the financial management of Alexian Brothers Community Services of Chattanooga and St. Louis, including risk reporting, Part D reporting, claims management and general ledger accounting.

Vicki Gray has worked in the elderly services and hospital consulting arenas as a research analyst for over 25 years. In 2003, Ms. Gray joined Continuum Development Services where she is responsible for project coordination and research, demographic and data analysis for PACE and operational review clients.

Ms. Gray has worked as a consultant with a nationally recognized actuarial firm and as an analyst for a regional hospital consultant where she provided data research support, including demographic analysis, health competitor analysis, and assisted senior consulting staff in strategic planning and marketing studies.

In 2003, Ms. Gray joined Continuum Development Services where she assists in operations reviews, including site visits, data collection, and analysis and report preparation. Ms. Gray also provides the firm's accounting support. Ms. Gray has a Bachelor of Science in Urban Studies and a Certificate in Gerontology from Georgia State University.

4. How many PACE clients are you currently serving? **CDS is currently working with 9 clients in either a development or consulting assistance capacity.**
5. How many PACE clients have you served since your TAC was created? **CDS has worked with 25 clients in a decision-making, operational support, program development or technical assistance support role.**
6. How many PACE feasibility studies have you conducted. **CDS has conducted 21 PACE feasibility studies.**
7. How many PACE applications have you submitted? **None, CDS contracts this service.**
8. How many organizations have you moved through the process from market feasibility to ongoing operations? **CDS has worked with six programs from initial development to operations. In addition, CDS President developed two programs prior to starting Continuum Development Services.**



9. List the states you have worked with and briefly describe your effectiveness in working with those states on rate setting.

Virginia-reviewed actuarial study and raised issues related to regional cost distribution

Illinois-developed alternative methodology to state's approach of utilizing initial determination of need scores

North Carolina-statewide rate already established

Michigan-reviewed actuarial rate setting methodology; achieved favorable rate for dual eligibles

Tennessee-negotiated the development of an adequate initial rate

Ohio-working with state to consider case mix reimbursement

Missouri-established initial rate, which was challenging and has improved over time

Mississippi-provided expert testimony to state Congressional committee

10. List the names of the PACE organizations you utilize as resources. Identify those that are used for site visits. **Alexian Brothers Community Services, Riverside PACE, LifeCircles, The Oaks**