SOAR: A Successful Model of Strategic Planning for PACE

Joan Kwiatkowski, CEO PACE Organization Rhode Island
Tony Silbert, Principle Spartina Consulting
At the conclusion of the presentation, the attendee will be able:

• To discuss and display use of the SOAR model within a planning process
• To share progress of the strategic plan of one PACE program
• To engage in discussion that will further the learning of the attendees
PACE Organization of Rhode Island Description

- Statewide PACE program
- 300 enrollees
- Over 100 employees
- Three physical locations
- Established 11 years ago
- Nonprofit independent entity
Value of Strategic Planning

- Focus use of resources: staff time, dollars, physical plant, leadership
- Creates clarity for staff and partners such as the State on what matters most and where opportunities exist
- Establishes possible futures
- Provides guidance on what talent an organization needs to be successful
- Creates more ownership through engaging all staff in the creation of the plan
Strengths
What are our greatest assets?

Opportunities
What can we improve, even innovate?

Aspirations
What is our preferred future?

Results
How do we know it when we see it? (measurable results)
Who was included in our process?

- All Board Members
- All Management
- All Staff
- Interviews with consumers and families
- Interviews with partners and vendors
- National PACE Association
- Other PACE programs

Examples of the value of these interviews:
- Richer Data
- Accurate market information
- Ideas that we never through of
- Ideas to stay away from
- How different success was measured by each party
Planning Process

- Board of Directors established Committee
- Committee identified learning needs
- Staff collated data book
- Secured outside Facilitator
- Completed interviews with mgmt.
- Organized the process to ensure we stayed on track
- Brought in outside content experts
- Educated Board and Mgmt on trends in PACE
- Provided mgmt with ideas on improvement opportunity
- Board and management retreat
- SOAR method applied
- Draft goals and action items identified
Question 1: I would like to learn more about:
  • Wound Care
  • How people are recruited to work @ PACE
  • Criteria for ALF/SNF placement

Question 2: Biggest challenge at work:
  • Time management related to high case load
  • The visit becomes problem centered rather than holistic
  • Communication with the many players: Clinic, Treatment, Triage, Homecare

Question 3: Opportunity for Improvement:
  • Add contracted homecare vendors for better CNA coverage
  • Provide additional activities in afternoon at the day center for ppts with late departures
PACE 2016 Strategic Planning Questions:

Question 4: Wouldn’t it be cool if....
- PACE owned a homecare agency
- PACE owned an ALF
- More staff support in the community by the team

Question 5: We should partner with ___ to improve our clients’ experience in PACE
Staff Retreat
PACE MISSION
To preserve and sustain the independence of frail elders wishing to remain in the community.

Top 5 Priorities for 2013
1. Financially sustain growth – sites
2. Quality of Care /Participant Satisfaction
3. Make PACE a household name
4. Nimbleness/Diversified business model
5. Patient centered medical home – benchmarks for care-delivery

1. Program/Operations
To move PACE RI from boutique program to evolve to integrated/interface with emerging MCO’s and health integrated networks.

2. Marketing/Communication
The primary resource for frail elders with chronic needs.

3. Policy/Regulation
Create strategies and flex as field becomes defined while protecting integrity of PACE model.

4. Financial
Achieving and improving financial stability and sustainability while continuing our growth and expansion goals.

5. Staffing
PACE will provide clients quality, compassionate professionals who will advance the mission through a commitment to continued excellence.
1. Program/Operations

To move PACE RI from boutique program to evolve to integrated/interface with emerging MCO’s and health integrated networks.

Key Initiatives:
- Software is ONC certified. Use to full potential.
- National PACE benchmarks
- Build relationships and tell the story and make us a more attractive partner using evidence based outcomes.
- Who are the potential partners?
- To reduce emergency room use and reduce nursing facility use.

2. Marketing/Communication

The primary resource for frail elders with chronic needs.

Key Initiatives:
- Articulate PACE value to Market & explain PACE in a consumer friendly way.
- Penetrate the markets of new sites
- Grow Census to 600 by 2015
- Increase Customer Satisfaction to X%
3. Policy/Regulation
Create strategies and flex as field becomes defined while protecting integrity of PACE model.

Key Initiatives:
- Explore alliance with Massachusetts sites for branding business and marketing (regional).
- Support national PACE innovation act.
- Bring issues to delegation in D.C.
- Offer contracts to MCO.
- Explore hire of lobbyist/state association.
- State shared value statement

4. Financial
Achieving and improving financial stability and sustainability while continuing our growth and expansion goals.

Key Initiatives:
- Reducing the net asset deficiency
- Contract management
- Fund growth while reducing costs

5. Staffing
PACE will provide clients quality, compassionate professionals who will advance the mission through a commitment to continued excellence.

Key Initiatives:
- After hours care (5p – 7a) reduce ER visits
- Volunteer program
- PACE quality values with vendors.
- Partnerships/alliance and shared values.
- Growth/dev. when expanding (new hires)
- (11-7 – C.N.A.s and homemakers) - pilot?
- Staff retention/recruit (NP’s, MD’s nursing)
- Hiring/on-boarding/training
Results of our Process - 2015

The four key challenges for any PACE program are: census growth, managed care expansion, rates paid by Medicaid and cost of care.

Our core strengths are quality of care, longevity of staff, high client satisfaction and approval of third location. We are proposing four goals and detailed tactics that we hope will not only sustain our existing strengths but support performance improvement, growth and innovation.

- **Mission Statement:** To preserve and sustain the independence of frail elders wishing to remain safely in the community
- **Values:** Innovation, Independence, Respect and Compassion
- **Purpose:** To be a community solution for adults living with complex health issues who can benefit from a unique model of health care
- **Strategic Goal Statements:** The initial 18 month business plan for the PACE Organization of RI is to be the best 350 person program in the country; during this period of time we will evaluate sales and enrollment tactics, marketing strategies, collaboration opportunities that will result in business growth, public relation efforts and maximization of CMS waivers and demonstrations that could result in census growth.
2015 - 2018 Goal Statements 1 & 2

• **State of Art and Science**: to innovate and deliver high quality, reliable care, the organization needs to gather and report data, track gaps in care, seek new ideas that will solve problems and push the boundaries using tools that will showcase our innovation.

• **Marketing, Public Relations and Business Development**: effective strategy that will position us well; insure strong champions; measure success in intake data, brand recognition and add value
Goals 3 & 4

• **Clinical and Financial Management:** Achieve and sustain quality outcomes, strong financial position, create and lead by data that will result in smart use of our treasures.

• **Client Engagement and Partners in Care:** We will pursue innovative solutions that will result in better care, smarter employees and an improved system of care for RI.
Goal # 1 State of the Art & Science

To innovate and deliver high quality, reliable care, the organization needs to gather and report data, track gaps in care, seek new ideas that will solve problems and push the boundaries using tools that will showcase our innovation.
Goal # 1 State of the Art & Science

Action Items:

- Lead by Data – develop a reliable system that can be easily accessed by managers and, where appropriate, participants
- Maintain Quality – already strong through leadership in clinical management
- Housing – develop, build or create options to retain elders in the community
- Consider New Populations – under 55, behavioral health or adults with disabilities
- Hire Home Care Aides – become a training site, build our own pool, consider buying a car for aides to use to reach distant locations
Next Steps

With goals established we then:

- Developed clear and measurable action items per goal (SMART goals)
- Modified our budget to align with the activities (e.g. bought the TV advertisements)
- Aligned our Quality calendar to measure our activities
- Modified our professional development calendar to support talent development (e.g. Behavioral health)
- Hired with specific talent and goals in mind (e.g. logistics background)
- Modified our public relations plan to mirror needs (e.g. identified new staff for various community mtgs)
Success to Date

• Completion of phase one with strong success
• Right talent in the right seats on the bus
• Budget is aligned and investments made on new E.H.R. and online Human Resource technology
• Board of Directors better educated and engaged
• No movement on rates; State relationship still suffers
Staff Retreat
Next Steps

• Agenda item for management meetings
• Reassessment to determine if anything NOT doable or if any changes in the market will effect our work
• Stay the course
• Continue communicating our success
  • Weekly newsletter
  • Board Reports
Home Care Strategy Update
A Message from Joan Kwiatkowsk, CEO

In the first goal of our strategic plan, we look to develop a business plan to analyze hiring of our own home care aides. To ideally become a training site and work with CareLink members, who are training sites, to develop and build our own aide pool. To support our aide pool we would consider transportation options that can be used by aides to reach out of area locations. To have this leg of the flight be successful, we have formed a home care strategy committee to analyze the options.

The home care strategy team is working hard and moving quickly. With a few meetings under our wings, we have completed a full review of home care staff job descriptions and are moving onto researching support opportunities. We are looking into opportunities like a caregiver training curriculum, the use of Pea Pod type services, and developing a care kit that aides can take into the clients home. Crafting a strategy around homecare that is sustainable and effective requires innovative thinking, and this committee has worked diligently on this plan these past months.

We anticipate presenting our full recommendations to the larger home care team in September. The team has done remarkable work and we are excited about the future.

Updating our Online Presence
Website Redesign

PACE Rhode Island has updated our online presence!
As part of the "Marketing, Business Development and Public Relations" and "State of the Art and Science" goals from our ongoing strategic plan. PACE is establishing a stronger online presence. We started this process with a complete redesign of our website. We looked at the needs and wants of our user base and evaluated our options. It became clear this was time to look to the future, and build a new website from the ground up. PACE partnered with TribalVision, a local digital marketing firm, to help make that vision a reality.

The new website was designed around the concept that information should be easy for everyone to obtain. The result is an interactive website that is easy to navigate for users at every level. We also have included more ways to quickly get in contact with live support here at PACE. The addition of our new "contact us" form, our new eligibility quiz, and our job application submission form are just a few ways that users can get in touch.

The new website offers new ways to see what is happening at PACE. With a direct feed from our Facebook page, you can see all of our posts without having to leave the webpage. Never miss another PACE event again with the addition of our new events page that gives you the option to add our events directly to your calendar. We also added new participant and staff testimonials, so you can hear all about PACE directly from the source.

PACE is viewed as a forward thinking leader in the healthcare community, and our new website exemplifies that reputation. If you have not had the chance, head to www.PACE-RI.org to check out our new website.
Closing Comments

• Organizations that have and follow strategic plans perform better than those that don’t
• Using SOAR allows you to focus on what you can do instead of what didn’t work in the past (SWOT)
• Engaging all staff (those most impacted) creates buy-in and commitment to the plan
• Communication and alignment are the two most important tools for successful implementation of a plan
Questions?