

Palmetto Health Senior Consulting

The following information is provided in response to questions posed by the National PACE Association for the purpose of providing information about the services **Palmetto Health Senior Consulting (PHSC)** offers to developing and operational PACE organizations. The information is current as of **November 2018**. Questions may be directed to John Tucker at John.Tucker@PalmettoHealth.org or 803-434-4427.

1. Which of the following services do you provide?

- Market feasibility: **Yes**
- CMS PACE Application/Expansion Application preparation: **Yes**
- PACE Financial Proforma/Budget Modeling: **Yes**
- Program start-up: **Yes**
- Operational support and technical assistance: **Yes**
- PACE Expansion support: **Yes**
- Other: **CMS Change of Ownership (CHOW)/Novation applications, PACE mergers and acquisitions, fiscal soundness evaluations, and IDT/service delivery training. PHSC also provides a monthly service delivery and finance benchmark service aimed at improving fiscal performance and service delivery profiles for operational PACE programs. There are currently ten (10) PACE Centers across the country participating in the benchmarking service as of November 2018.**

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

1995

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

John Tucker, MHA, Director, Palmetto Health Senior Consulting (PHSC): John has been with PHSC since 1998 and has been providing PACE technical assistance services for more than twenty (20) years. John's areas of expertise include:

- PACE financial analysis and development of start-up and operational financial proformas**
- PACE financial performance including revenue and expense analysis**
- PACE Change of Ownership (CHOW), mergers and acquisitions, PACE valuations, CMS Novation process**
- Service delivery utilization management and IDT function**
- Executive leadership mentoring and coaching**
- PACE demographic and market analysis**
- PACE governance and organizational structure**
- CMS Provider Application preparation**
- Medicare Part D consultation**
- Provider network development and contracting**

- **PACE intake and marketing strategies**

John has completed numerous PACE feasibility studies for large integrated health systems, long-term care institutional providers, Hospice organizations, adult day care organizations, among others and has been instrumental in assisting organizations and their leaders in deciding whether to move forward with PACE. He also works with and advises clients on organizational and governance issues and has consulted with clients on capitalization and financing issues related to PACE start-up along with provider network development and contracting.

John has assisted close to fifty (50) organizations in achieving PACE provider status over the past twenty (20) years. He also consults with clients on PACE fiscal soundness and financial performance, service delivery strategies and utilization management, and intake and marketing. John has excellent working relationships with multiple state Medicaid offices and has worked closely with many states as an advisor as PACE was being implemented.

John has recently served in interim Executive leadership roles at three (3) different PACE organizations in the Southeast and routinely provides executive leadership coaching and mentoring.

John is a regular presenter at the National PACE Association Annual Conference and Public Policy Forum.

Rhett Clark, MHA, Manager, Palmetto Health Senior Consulting: Rhett has been with PHSC since 2006 and has been providing PACE technical assistance services for more than twelve (12) years. Rhett's areas of expertise include:

- **CMS Provider Application/Expansion Application preparation**
- **CMS Part D application preparation**
- **PACE State Readiness Review preparation**
- **PACE Financial and Utilization benchmarking**
- **PACE fiscal performance guidance including revenue and expense analysis**
- **PACE demographic market analysis**
- **Collaboration with CMS and State Administering Agencies**
- **PACE governance and organizational structure**
- **PACE back office guidance/consultation**
- **PACE policies and procedures development and compliance**
- **PACE Provider Network development and sub-contractor credentialing**

Rhett has assisted close to fifty (50) clients in achieving PACE provider status over the past twelve (12) years and has co-authored multiple PACE provider applications. He also consults with clients on contracted services and provider network development, personnel file compliance, transportation and nutrition services, and PACE program policy and procedure compliance.

4. How many PACE clients are you currently serving?

Please contact PHSC directly for current information.

5. How many PACE clients have you served since your TAC was created?

More than 100

6. How many PACE feasibility studies have you conducted?

More than 80

7. How many PACE applications have you submitted?

Close to 50

8. How many organizations have you moved through the process from market feasibility to ongoing operations?

Close to 40

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

Alabama, Arkansas, California, Florida, Georgia, Hawaii, Kentucky, Louisiana, Maryland, Massachusetts, Michigan, Missouri, New Jersey, New York, North Carolina, Ohio, Oklahoma, Pennsylvania, South Carolina, Tennessee, Texas, Vermont, Virginia, Washington DC, and West Virginia.

10. List the names of the PACE organizations you utilize as resources. Identify those that are used for site visits.

Palmetto SeniorCare PACE

11. Provide a list of previous and current clients (including contact information) that have agreed to serve as references.

Please contact PHSC directly for current information.