November 15, 2017: Information to Action: Strategic Planning and Change Management

I'd like to thank you for joining today's webinar. Information to action, planning and change management. This is presented through the Business Acumen Center, part of the disability network management and the National Association of States United for Aging and Disabilities, made possible by the Administration for Community Living. Today we will hear from Mark Davis, Executive Director at the Ohio Provider Resource Association and the Center for Epidemiological Research for Individuals with Intellectual and Developmental Disabilities. Mark will pick up where we left off last month during the planning webinar. In that webinar, we discussed the importance of a clear vision for your organization and work. A clear vision will guide your work and help you communicate your objectives to others. We also discussed how the completion of an environmental scan and SWOT, along with feedback from stakeholders in support of champions can be used to inform the development and implementation of your strategic plan. Today, Mark will describe how to use the information collected during the activities. By the end of today's webinar, we hope to further your understanding of how to use the data collected through an environmental scan and SWOT analysis to inform your organization’s strategic plan; how different business tools can be used to help inform your organizational change and operational decisions, and how your business intelligence can be used to communicate strategic direction to staff. With this introduction I would like to hand the presentation over to Mark to start today's presentation.

Thank you. Hello everybody. Thanks for being on the call today. We will go ahead and proceed and then at the end we will have about 15 minutes for questions. First of all I want to talk about the next step in the process using your data to inform your strategic plan, you have completed your environment scan an oval you've included your customers or stakeholders, champions and developed champions, casting a bright net to have a wide array of input from everyone in your work universe. I know with us, we are a trade association and we talked to members in every community, we talked to experts in the field, vendors, legislators, the administrations, we have conversations, we do web searches, go to conferences and see what people are talking about, what are the hot topics and we do searches as part of an environmental scan that informs the SWOT analysis that I will go to more detail. The strategic analysis given the data you've gotten in your environment will scan and in your SWOT analysis, the real question that we will be asking today is , what does the data tell you about our mission and vision? Is it current, is it relevant, is it important? Next I will say a little more about those three. Want to ask yourself, looking at the current mission, and your current strategic plan, particularly her mission. Is it current to the needs of the people you serve, your ultimate customers? The person with intellectual developmental disabilities, the person with a disability, mental illness, aging population, seniors, who is your ultimate customer? Is it current or is it old getting dated? Does the data tell you a different story than your mission says you're going for. A look in terms of being current to the needs of payers. As we shift to a more integrated care environment, more involved with managed care organizations and other forms of integration of care, is it what the payers want? Also policymakers, making the rules, is this what your governor or legislature or folks in the federal government and others want? You're looking at your customers, payers and policymakers. To see if it's current, current with the times. Is your mission relevant? You look at the context of the data you collected. You find that everybody is talking about living in the community, and your mission says that we don't want people to live in the community. Then you would say, it's probably not relevant within the context of the data collected, because 89% of the people say that they really want to look at going down path A we looking B. These are in no particular order, not one is more important than the other. Third is, are you doing important work? This is work that is having a meaningful impact on the lives of the people that you serve and is it important to the payers and policy makers as well. Are you doing important work? Mark Twain month said, everybody talks about the weather but nobody does anything about it. Is it important. There was an excellent article if you haven't read it, it's called marketing myopia. Is from a long time ago, 57 years ago. The Harvard business review from 1960 written by Theodore Levitt. It changed the way a lot of businesses and inform strategic planning continues to inform. What Theodore Levitt said was, are you focusing on products or are you focusing on customers? Focusing on products or customers? He said, what business are you really in? All talk here about the impact it can have on the railroads, the movie business and also class. So why did the railroad stop growing? Railroads got into significant problems financially because the need for passenger and freight transportation declined. It's not true. It actually grew, but what they did was incorrectly defined their business and they assumed they were in the railroad business rather than the transportation business. The consideration that we pull away is, in our industry, what is our business and are we product oriented or customer oriented. With the movies, Hollywood got into some serious problems. All of the established film companies went through serious we organizations. Some simply went out of business and they all were in trouble. They assumed they were in the movie business rather than the entertainment business. As you know, any movie that comes out has -- they leverage the movie in terms of entertainment to create additional markets that support the industry. The industry broadens its go from movies only to the entertainment industry. If you have the latest Superman movie, you are sure that will be out on DVD, it will be streamed and available -- they will have balls and Halloween costumes and comic books, and plates and lunchboxes, backpacks and close, insurance, and shoes, and a goes on at infinite. They have actually at -- leverage the entertainment business rather than looking at just the movie business. Will we take away in our industry is, is there an opportunity to expand your business Lex? Levitt said, this is really interesting because he said this about [Indiscernible]. It is constant watchfulness for opportunities to apply their technical know-how to the creation of customer satisfying uses that accounts for their prodigious output of successful new products. I would say that the same approach to business is more important in our industry now then at any time in our history one of the questions that is really important to ask. As we go through this process, what business are you really in? There are folks that say, the business we are in when we ask folks, they will say we are in the -- we provide residential services or we provide [Indiscernible] services, and if you ask somebody else, they will say we provide opportunities for people with intellectual development of disabilities to live and thrive in their community. We provide safe environments in the residents of their choice. I hope you see the difference. We are looking at it from a customer perspective rather than a product perspective. Our end -- the business we're in is enabling people with disabilities to have every opportunity in life that you and I have. That everybody else has and remove barriers were blocks to opportunities is what we are about. How we do that involves with time. That determines business processes but not the business we're in. How do we get to that, what business we are in, and understand what the customers want, and what are we giving them and not giving them? There are a couple of ways to do it. These are with customers and staff. It's to do small group discussions. It's important to use people first language. A lot of us are very good at that. I'm not very good at it. This is not just talking to people with disabilities, it's talking with everyone. Studies have come out and said that it used to be an eighth grade reading level, but now we need to talk and communicate clearly to people, it's better to talk at a sixth grade reading level. I try to think about that as we have a small group discussions. To them at times that are convenient to them. Often times we have small group discussions that occur at 2:59 PM in the afternoon, while people are working, or maybe they are our day services or their on a job. Look at times that are convenient to them. I had an organization that we were talking about how we couldn't get people to come to the orientation. It was managed care organization for children with multiple needs and their families. It was publicly funded and a cool approach but we were doing orientations for how we were going to work directly and [Indiscernible] managed care organization. Finally we said, what do we just redesigned orientation and take it to them. We did the orientation in their home. Sometimes a small group may be just a family one or two people, but we found that to be very helpful. Ask relevant questions and make sure that you have questions ahead of time that you want to ask about what they really want out of your

services. What do they want out of life. Allowed the discussion to happen in an organic matter as opposed to just trying to get them to sign off on what your strategic plan is. And what your direction is. Online surveys are another very good way of putting a URL here that you can use. You can cut and paste that into your browser. It's a pretty good description by PC Magazine that talks about a variety of different surveys and it talks about -- how do they interact with social media, what kind of themes or advanced matrix feature services they half, supports -- it has a lot of information. It's really helpful. Social media polls and trolls. If you have a Facebook page, a Twitter account, Instagram, or however you communicate with folks, make sure you are capturing a data and at the end of the month summarize it. Troll the data for common themes and make sure that when you see something you don't understand, go out there and be a little disruptive. Ask people what they mean and say you not really clear and try to get some more information about that. We look at our email traffic every month. We done that and look for common themes to inform strategic planning processes that's part of our environment scan as well. Going to payers and policymakers input. This is where you actually sit down with them and talk to them about your strategic direction. We bring our draft plan to them and say, any comments or questions, filter out the process. Continue to ask them, are we going in the direction that you really want us to be going in and what business do you want us to be in? What do you see as our purpose, as our value proposition? When you sit down and talk with your staff, make sure you ask your staff what do you think our agency provides? What business do you see us being in? I found that to be extremely informative, as our staff starts to say, some staff would say, that we are really in the business of giving people opportunity and really helping them maximize their potential and growth and be safe, and talk about outcomes for the individual. Others would say, we do residential treatment. We do transportation. We really want to make sure that our culture, supports the outcome based customer focused orientation. We are very clear with people about the business that we are in. There is a continuum of being a service focused agency to being a customer focused agency and asking yourself where you are on that continue on. You ask yourself and ask your customers, what your customers want they cannot giving them? How can you better leverage technology to give your customers what they want? We talk a lot about this in our field about everybody on this call has access to the Internet or you wouldn't be on the call. We all have Facebook pages and other social media accounts. We have email, access to smart phones, and when you look at people with disabilities, most of them don't have one. Why is that? Because it's not medically necessary? It's necessary to be totally integrated in your community. If you're not part of the virtual community, you're not part of the community. In terms of what business we're in, think about how you leverage technology to really give your customers more of what they want. What are the potential impacts on agencies strategic plan. What you collected the data on this, look and see what the data is telling you and what the folks are saying in terms of what business they want you to be in, versus what business your strategic plan tells you that you are in. This is a shameless picture of my granddaughters. The question is, it's a picture on an depiction of, what is your value proposition? How do you bring value to the lives of people with disabilities to people in the senior population. How do you bring value and what is that value looking like. We have to start with, the primary value we bring to people's lives is love and service. It's caring for each other and helping other people to achieve the success in life that we want for everybody that we live.

A frog in love would not be enchanted to learn that her beloved had turned into its charming-Mason Cooley. We want to make sure that we look from the customer's perspective and ask them what they want and not turn a frog into French charming that wants to stay a frog. Now we've got this data, we talk to folks and determine what business we're in and said, we know that we are in this business. If it is the business of giving folks opportunities and keeping people safe, making sure they are medical stable, what is our business of making sure we know our business and the population we are working with, and taking a look at strategic plan and saying, how well does my work our strategic plan and services we provide a line with your new mission and vision? Where are we going and ask yourself are you committed to your mission? Are your leadership team clear on what the mission is and understand beyond a shadow of a doubt what the mission is an understanding of the strategic plan National Association of States United for Aging and

Disabilities toward your mission that your strategic plan is really centered around your mission. Ask yourself in the next circle of influence within your organization, your staff or customers, board members, people outside of your leadership team, to the understand your mission and strategic direction? If not, revisited with or go back to the organizational leaders and say, we might have missed the mark here. And revisit your strategic planning. R. DiRusso said prior planning prevents poor performance. That's important. We wanted to make sure that throughout the strategic planning process, we want to be inclusive in our inputs to the process, in terms of objective and subjective information. Were talking a lot about data and about that there is subjective parts as well. What are people wanting from your organization. We want to talk to customers, and what we do it our plant is go to our members and there are customers. You can go to any type of family group that you have four people that you serve, to the payers, and two other public officials, perhaps case management agencies, you can do electronic feedback for voting. We do smart phones and a web enabled. Here is what we're thinking our strategic plan will be, here is what the data has told us, and here is what we found through the data, and here is where we ended up. I will talk about how we do that. When we get there, we say, we ask for input. We do that with staff, payers, policymakers, and other resources. We look at other sources that I talked about earlier, research, regulations, waiver applications of the states, comments is and try to do continually the internal scanning, not something that we do once, environmental scanning is something we do constantly. How do we create this document. This guiding document for us to achieve our mission? We do a -- we've already done a SWOT analysis and an environmental scan with our customers, and now we take it to the governing authorities. Whoever is the organization or individuals that are having the final authority to okay the strategic plan are the folks were talking about. We take the data from the environmental scan, and from the SWOT analysis that was done previously, and do basically another SWOT analysis with the board, pulling it together . With the board or whoever the governing body is. We are looking to distill the data down into its most critical points so we want to look at what it is telling us, the story it's telling us. We want to say that, here is the direction of funding, the direction of court cases, the direction of policymakers and payers, the direction of our ultimate customers and what they are asking this for, and here is what were not doing. To have an open and honest conversation about that. Before the strategic planning meeting, I'm going to keep seeing board but you understand whoever has authority over that. It's important to give them at least one or two weeks of time to look through documents. We typically get at least a week. The last major planning process we went through, we gave them 55 documents to look at, to give you an idea of the universe, and said, here are documents they can inform your decision. From that, that distillation is really important, to take a look at what's important in there and what we want to focus on. We start with the current strategic plan that we are looking to revise, or if you're new, start with the environment will scan. Will talk about what the priority areas are. What are the most important areas that need to be focused on. It will be a guided conversation, not a, here's a staff saying here's what we have to do. It's a guided conversation with folks, it and we encourage you to do a draft plan, do several drafting get feedback on them. I can't say this enough, keep it simple, keep it simple, and keep it focused on priorities. 1 to 3 primary focus areas of our organization. Researches shown that if organizations focus on too much, they are ineffective. If a narrow their focus and really marshal the resources towards a 1 to 3 priorities, they are highly effective. Especially in the social services arena. I would suggest to keep it simple, keep it very focused. With the strategic plan that I inherited, that I came to have -- over 10 pages with 20 goals, and I'll show you that our strategic plan today has three focused areas and three goals under each one. That's all we have. We have one page and that's our strategic plan. We have distilled 55 documents, hundreds and hundreds of pages of data and information , we distilled it to its essence and said, what business are we in and one of the areas that are most important in our case to our members, and in your case to the people you support and serve, payers, policymakers, family members. We finalize the strategic plan by going and getting input on the drafts strategic plans and finalize the plan, and the board a governing body or whoever votes and says this is where we are. I would encourage organizations to move towards a unanimous support from your governing body as opposed to consensus or majority vote. If that is the driving force behind how you achieve your message, it would seem best if everyone on the board could say, that's good for us. That's what we go for as well. It's the dynamic living, breathing organic document. It's not to be put on the shelf and I'll say how we do that. This is an example of a strategic -- it's our provider Association of strategic plan. You can see the mission statement driving everything on the top. Then the 2000 1718 focus areas and goals. Ours are, we've revised the plan every year and it's a rolling two-year strategic plan. On the research shows that you can have a vision for 3 to 5 years out and that's important, but really as far as operationally, 2 to 3 years and three years is almost too long. Anywhere between 1 to 2 years is usually good. We do it every year. We do the environment scan, SWOT analysis every year, and then we have it for a rolling two years. You can see the three top areas, workforce sustainability, I don't think anyone in healthcare would disagree that work force is a significant issue for us. Quality, accountable and sustainable system reform is something that was important and also efficiencies and simplification. These are in order. Most people read left to right so when people voted on what focused areas they were most important, workforce sustainability with our organization got extremely high votes from our neighbors and others. The system reform a second and efficiencies and some publications were third. We put those in order left to right and we do top to bottom in terms of the ones that get the most votes for the three goals as well. You can see some of these have goals and ultimate goals of an average [Indiscernible] of 200% of the federal poverty level and other say things like under efficiency sense of publications, the second goal is to work with system partners to develop and implement simple reimbursement systems. Some can be more broad and some can be more focused. They are the areas that the organizations felt are most important and most accurately reflect the business that we are in. You got your strategic plan, your mission, now what do you do. Maintaining your mission takes -- you have to avoid -- maintaining that takes discipline. You for this 100 times already, but a strategic plan and mission are not to be put on the shelf and not gone back to. You should regularly review the scope of your organization's work in light of your mission and strategic plan. Make sure your work is aligned with your mission in your strategic plan. It's easy -- my staff talks about squirrels and I want to go down a different plan. You for that metaphor I'm sure, but we have to avoid the squirrels. We really have to stick to our strategic plan. This will help us achieve our mission. Develop measurable benchmarks with real-time business intelligence reporting. Business intelligence is basically data that informs or business process and quality and everything about your business. You want to continue to have your strategic plan. I carry might with me so it's always with me. I always have a copy with it. We carry all of our -- the agenda is driven by the strategic plan, so we have sustainable workforce is number one, system reform is to, and third is efficiencies and certification on the agenda. The items underneath that they relate to the goals of the strategic plan, so they are in alignment. We have staff meetings and we talk about the strategic plan and we talk about our work in alignment with the strategic plan. I think you'll find that if you carry your strategic plan around with you, develop your agenda so that it's in the order and reflects the strategic plan and you do your evaluations the same way. When you talk about -- you'll ask how this relates to our strategic plan. It becomes ingrained in your culture, that this is really important and it drives our work. Also, it's organic and something that is living, breathing, dynamic and subject to change. When you look at it through all of this reporting and discussion, you either revise or reject, or keep your strategic plan in place. It's a data informed process, not a data-driven process, but a data informed process. In the end, people always make the decisions, not data. How do you know if you're successful? What our submission metrics? Business metrics you can use or mission metrics our customer outcomes achieved. This is not the number of staff, not that -- it's operating productivity, you're looking more at , did someone get a job or do they have a friend it's not paid to be their friend, is someone safe and healthy in their community, is someone in the environment of their choice. Customer outcomes achieved, means we have to know what our customers want. How can we gauge outcomes if we don't know what they want? You have to start with the end in mind. Customer growth and retention: I don't think you can ride the fence for long, either your growing or dying. That's for organizations. Look at customer growth and retention, make sure you have those numbers, look at staff retention. A major issue in our field, we have 51% in Ohio staff turnover, it's not uncommon, about 45% nationally. We have to look at what that tells us about our business model. How successful are we being with staff retention if were night able to keep staff? Contract compliance: look at your agreements with your managed care organizations and other payers. Make sure that you have metrics that tell you whether you are in compliance with those are not. You have revenue targets. You want to hit them or don't, you want to visit that regulate. Operating productivity is not as common in IDD not as common, but looking at if our product is service delivered by an individual staff person, sometimes technology, sometimes unpaid support so we really have to look differently than that. Right now our primary product is staff. How are we -- how productive are we with each unit of staff at how are we maximizing the productivity. Looking at your overhead cost, technology is helpful there and looking at partnerships. Obviously your monthly profit or loss, no mission no margin, no margin no mission, sorry. Whether you profit or nonprofit, you have to have that revenue above expenses we won't be around. Business intelligence prepares an organization to identify and prepare for it significant trends in your profession. As you collect your business intelligence, as you are having these conversations with your customers and they are saying, I want A and you keep giving me B, you will be ahead of the curve in terms of developing services and ways in which to give your customers what they want. You have to ask yourself what are the transfer your primary services and potential services. I would say, for your customers rather than services. What is customer demand telling you? How is your pricing in line with others? In the way of Medicaid sometimes prices are set but sometimes not, especially in self-directed waivers. Margins , how are they comparing with others? Is not atypical for margins in the human services industry to be around 1%. That's my grocery stores, really bad. How can you work with that? What about your cost side? What are trends around cost? What our state of federal policy changes? DOL put out a request for information from the overtime exemption again. How might that affect you? We understand that CMS is now looking at the managed-care role in the access rule, how that might affect you. Some other ones in terms of customer centered, shared living, technology enabled supports, employment services, integrated care, how are you communicating and talking with the healthcare and acute-care side of Medicaid? Do you have relationships and business partner agreements across the entire Medicaid spent and where are you with integrated care? Development -- multiple ways to mitigate strategic direction with staff. You have your environmental scan, your SWOT analysis, you developed your strategic plan, you've began the medication with folks and devote business metrics that tell you, for example, what is the average direct support professional pay, $10.27 and how does that compare to $16 or, $17, were not there yet. We continue to monitor that and see how we progress in terms of increasing the average pay for staff. What we do? We develop and share a scorecard for our organization. Keep it simple with clear measurable's. I will talk in the next couple of slides about the scorecard, but another way that is to include strategic direction articles in every newsletter. I talked about how our agendas are driven by our strategic plan. They are literally structured around our strategic plan. The focus areas one, two, and three that we have and the goals within those. You use analytics to measure and do that in your newsletter article we talk about how you're doing on the strategic plan and you use analytics to measure click through rates. As you get newsletters to your staff, you know who your staff are, if you use the proper contact tools and you can analyze click through rates and modify your articles for those who are not getting a higher click through rates and you begin to learn what works in terms of can indication for strategic direction to your staff and your key stakeholders. Some of the things that are helpful is to use graphics that are appealing to the eye. Start the article with a brief summary that grabs people. One sentence, not very much, two sentences include pictures and as I said earlier, used people first language. That people don't understand what they read, they won't click through. The balance scorecard, many of you probably are familiar. We been around for a while. You basically answer for questions. They say, look at the four perspectives, the customer perspective and a questions you ask our how to customer CS. Dear customer see you as a provider of residential services, or to your customer see you as someone who is a provider of opportunities, safety, etc.? Internal business perspective, what must we excel at? What do we have to be good internally at the P successful? Innovation and learning perspective, can we continue to improve and create value? Talked about opportunities we shared living technologies. Integration across the entire Medicaid spend, so doing more with healthcare providers, etc. The fourth basic area of perspective is the financial perspective. How do we look to our shareholders? Shareholders, if you are a private nonprofit of the community, a private nonprofit is owned by the community in our responsibility is to return more value to the community that we take out by not paying taxes. That's our responsibility as nonprofits. If you are for-profit your shareholders are more easily defined. It away, how do we look to the people who own us? For areas that you can look at really quickly, a balance scorecard is a quadrant. There are four areas. You report on these and each quadrant gets a grade, and you can do green, yellow, red, meaning green your meeting it, grade means we are -- -- the important ones we are. And red means there are metrics were not meeting in that quadrant of the balance scorecard. For areas I found to be helpful are, especially in social services are quality, customer service, financial, and quality of work life. Basically for our staff. I want to talk and wrap up with our ultimate goals. Our ultimate goals are to use data to have a current, relevant and important mission and vision. Current, relevant, and important mission and vision. To have a data and customer informed strategic plan aligned with our mission and vision. Once we have a mission and vision consistent with the business that we are in, what our customers really want, then we can, and it's data-driven, data informed, not data-driven, we can ensure that the strategic plan that we developed is aligned with that mission and vision. Mission and vision come first, then you developed the strategic plan that aligns with the mission and vision we have an operational plan that is aligned with your strategic plan. Underneath each of the goals, you have strategies and methods for your staff and team, yourself, to achieve goals to make progress on that focus area. To achieve your mission. You are all driving toward the same, whether you use a Northstar approach for a valance scorecard or whatever golden thread, whatever management technique you use, it is all about organizing your resources in a way that drives you through an operational plan to a strategic direction that leads you to a consulate of your mission. Always focus and keeping it simple, focused and customer centered. The data collection, once you have that set up, you are in line, the natural inclination of folks is to put our head down and say, we've got our plans and I'm doing a plan and working the plan. We don't look up. You have to look up every now and then and business intelligence that is set up on a regular basis to get customer feedback and input through surveys that we talked about, through social media, and other mechanisms, they are critical of this. Look at the data, where are the numbers and how are we doing with employee retention, customer retention and growth, and looking at those numbers on a regular basis. This allows you to stay the course. What your customers want? It allows you to, if the course is not the course your customers want, you can be nimble in an environment and in a managed care environment, it's really important to be able to say, maybe we will do this a little differently and you approach her managed-care partner and say, I think we want to do this a little differently. You'll talk to them differently about what your ideas are that are based on data, based on data from customer feedback, from National Association of States United for Aging and Disabilities seeing, financial and quality trends that can then drive the conversation in a very productive way. You can actually create new business models. I've done that a lot. A lot of folks do that in a managed care environment. If you are able to improve the experience of care for the person, achieve better outcomes for the population, and lower costs, you are going to have a really good audience with your payers, whether the managed-care companies, states, counties or whoever your payers are.'s private insurance coverage, folks really want to hear that. Using data within the context of your mission and vision and strategic plan that we talked about, this can really allow you to be successful. This conversation, will be pleased with this if you do that. If you have those conversations in that way. You need to develop effective communication strategies to keep your staff informed. You will look at -- do we have newsletters they go out to everybody? Do we have a staff newsletter, and E lose the other -- E newsletter. Do we have a website that is secure for just our staff. Do we have -- we used to do payroll stuffers, but how do we communicate with our staff. Do we have social media, do we have -- do we promote our staff in terms of not necessarily promoting on the job of promoting them in terms of good work that they've done and the outcomes that they've achieved with people. I learned a long time ago, I used to sell Italian sausage it fares during high school and college. I found that the best way to get a lot of people at a festival was to have a parade. If you have a parade, everybody's relative of the person in the parade will be at the festival. It's the same thing, you're probably scratching your head. It's the same thing I find with staff. The more I put pictures of, the more I talk about what staff do, the more I put it on our website, the more I do those, and I'm not really good at it, but the more I do those things as a provider, I put those things up and more people will be driven to that website, the more people will be in line in sync with your vision and your vision and strategic plan. Keep your staff informed. Keep your eye on the prize and keep your eye on giving people disabilities, every opportunity in life that you and I have in removing those barriers to that. Your strategic plan really can't help but be successful. At this point, I will go ahead and open it up for questions or comments, and I believe I will turn it back over to Erica.

Thank you Mark. We do have time for questions. If you see the Q&A box in the lower writing quarter of your webinar screen, that is where you can enter those questions. One question that we frequently get is, where can we find the recording of this webinar as well as the slides and even the past webinars? All of that information can be found, the HCBS website. Hcbsbusinessacumen.org. I'm waiting for questions to come in. As we wait here for just a moment, Mark you did a great job describing the importance of meeting to really frame yourself correctly, to be able to look at your business and say, what is the business that we are really in. If an organization has a moment that the way we been thinking about ourselves is more narrow than what it needs to be and there are opportunities that we can capture, if we broaden our perspective of what our businesses, what is the first thing they should do once they have that moment?

The most important thing is to make sure that your customers are in a line with that moment. So you talk with your folks that you serve and talk with your leadership team in your board about, if that's an area that you want to go into, then also began to develop a and understand what that means in terms of your current business model. We have looked at our internal resources, and our structure, staffing patterns, our reserves, financially and organizationally, whether we are positioned to take advantage of that aha moment. If we are, we develop or redevelop our strategic plan and make sure it's consistent with the mission and move forward. If it comes business development at that point.

Thinking about making sure that it fits with your customers, I would envision that often that it might open up your customer base. If you are serving one population, you might find that the services you deliver are also appropriate for another population. Perhaps there is some reaching out to that new group to investigate and determine whether or not they are really interested, or whether be value in that?

Absolutely. One of the areas we will see growth in is the blending and of aging and disabilities. You have aging caregivers who are beginning to need assistance themselves through the aging system and then you have a son or daughter that is living at home with them with a disability. How do we do that? This mom and dad -- to mom and dad have one caregiver and is the son or daughter have another, or do we combine those? We are starting to see more of that. I think we will see more of a blending of aging and disability services on the delivery side.

Some customers don't want the same caregiver. They want somebody different. We've heard that some folks are okay with it.

We have a question in a traditional nonprofit, for example, a governing board, and I apologize I don't know what the acronym is, and ED -- Executive Director, what is your thought about including staff in the strategic planning process with the board?

I can tell you that I've always included the staff of the strategic planning process with the board. From the direct care level all the way up. I think everybody has to have input and everybody can be at the strategic planning meeting. That usually the leadership team of the organization. I can tell you that we have nine staff for trade associations so we tend to have smaller staff. Over half of our staff go to the strategic planning session with the board and participate in an active way. We have five out of nine ago. One that comes in, the finance person comes in for a little bit. It's critical to have everybody there when you're making decisions. We have the leadership team and the board at the ultimate deciding of the strategic plan, but in the process, the staff always gets input and it's put into the environmental scan. Whatever the staff members said on their comments on the surveys or how web are we collected the data -- -- you can have the last place with a couple of hundred staff -- they all got input. I think it's really important.

Had looks like you may have cover the topics so thoroughly that we don't have questions. If you want to submit your question, right now -- is there anything that we haven't talked about were discussed in the webinar that you would include as final bits of advice?

In the bonus round, more about a balanced scorecard. Three ways in which this kind of approach can add value is that it's and iterative process that over time will enhance the role and function and scope of the -- and financial health of the organization so that iterative process is the value you take away from it. It allows you as an organization to determine your value metrics. What are we going to measure success by and get you thinking in terms of what do the numbers need to tell us and what does the data need to tell us. Both subjective, objective, in order to see if were delivering on our value proposition. Most important, in my mind, besides the iterative process and improving over time, determining the metrics, it outlines your financial operations and strategies -- it aligns those endpoints everything till -- torture mission. Those are the three takeaways I would give in terms of the net result that we want to take away. The iterative process and proven quality improvement performance to determine value metrics and aligning the finance operations and strategy. >> With those final thoughts, I think we will end the webinar. I want to thank everyone again for joining us. For more information you can visit hcbsbusinessacumen.org , or if you have specific questions feel free to email businessacumen@nasuad.org and we have our phone line if you want to speak to someone directly. Thank you Mark for your time and information. We look forward to speaking with everyone again in December. Take care.

[Event concluded]