

PLANNING TO PLAN?

**TOOLS TO USE TO HELP YOU BETTER
UNDERSTAND YOUR CURRENT BUSINESS
ENVIRONMENT.**

October 2017

Today's Speakers



2

■ Erica Anderson, MA

- Senior Director of Business Acumen, National Association of States United for Aging and Disabilities (NASUAD)

■ Elizabeth Priaulx, J.D.

- Senior Disability Legal Specialist, National Disability Rights Network (NDRN)

Change

3



Planning to Plan

4

- Organization Vision
- Environmental Scan
- SWOT Analysis
- Champion Development

Vision

5

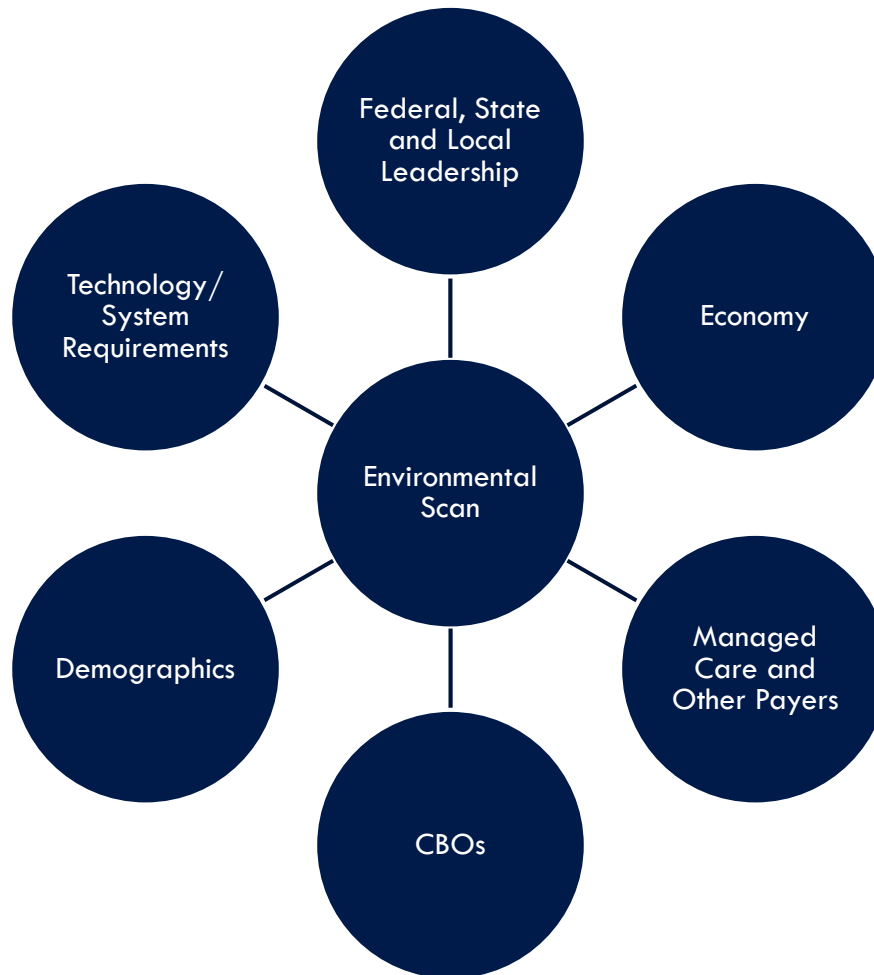
- Articulate a concise statement that captures what you are trying to achieve
- Identify the results you are trying to achieve and the strategies and activities that will lead to those results
- Identify your “niche

- Does your vision describe:
 - What it is that you want to do? What part of your business you want to sustain or develop?
 - How you your service or organization fits within your community?

- Does it prompt you to think about:
 - What you will do to be successful?
 - How you will know if you were successful?

Environmental Scan

7



Environmental Scan

8

Federal, State and Local Leadership

- ❑ What are the preferences and priorities of key policymakers and political leaders?
- ❑ Is the change a part of a political campaign? Who is driving it?
- ❑ Are major transitions in political leadership about to take place?
- ❑ What are the mood and priorities of the public at large?
- ❑ Are there any state or local policies or regulations that could impact your efforts to pursue partnerships with the healthcare sector (e.g. service restrictions or reimbursement opportunities)?
- ❑ Is your state using or transitioning to MLTSS?

Demographics

- ❑ Are new populations emerging in your community that would benefit from the services you offer?
- ❑ Do you need to adapt how you provide services in order to meet the needs of a new population?
- ❑ Are you expecting the demand for your services to increase or decrease over time?

Economy

- ❑ What is the general economic state of your community, including the fiscal conditions of your state and locality?
- ❑ To what extent do changing economic conditions affect demand for the types of services you offer and the availability of resources to support your work?

Managed Care and Other Payers

- ❑ Where does funding come from? i.e. managed care, the county, the VA, etc.?
- ❑ What are the priorities and initiatives of funding sources?
- ❑ Who are collaborative forces; who are competitive forces?
- ❑ What are the requirements of the payers you hope to work with?
- ❑ How can your services help them meet their requirements?

Technology/System Requirements

- ❑ What data do they expect to receive from you?
- ❑ What systems will you use to demonstrate your value?
- ❑ What systems do they use?
- ❑ Do you have the ability to collect and transfer data in real time?
- ❑ Do you have systems to measure quality and performance?

Community Based Organizations

- ❑ Who are your competitors/collaborators?
- ❑ How are you similar or different from them?
- ❑ What is your initiative's unique capacity?

Environmental Scan



	General Trends	Opportunities	Threats
Federal, State and Local Leadership			
Economy			
Demographics			
Managed Care and Other Payers			
Technology/ System Requirements			
Community Based Organizations			

SWOT Analysis

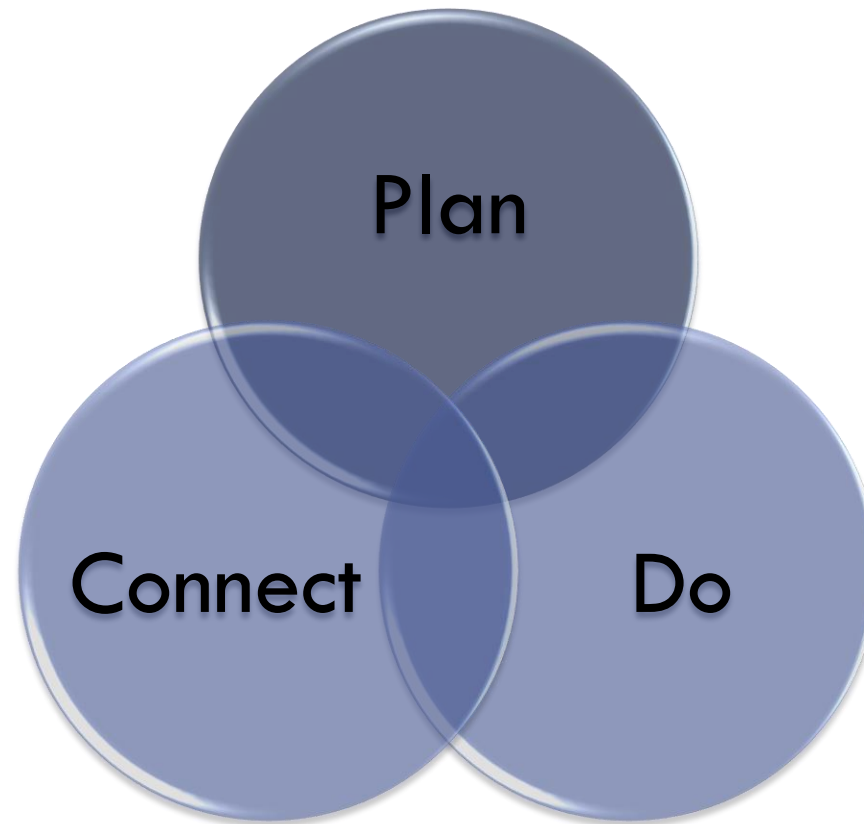
10

- **Strengths**
- **Weaknesses**
- **Opportunities**
- **Threats**

SWOT Analysis

	Internal Environment		External Environment	
	Strengths	Weaknesses	Opportunities	Threats
Federal, State and Local Leadership				
Economy				
Demographics				
Managed Care and Other Payers				
Technology/ System Requirements				
Community Based Organizations				

Who should be at the table?



Create Champions

13

- A *stakeholder* is a person or entity with an interest or concern in your business.
- A *champion* believes in your business and will help others to believe in it as well.

Stakeholder or Champion?

- People with an interest in your product or service
- Someone who can provide staff, money, technology, information, or influence
- People who will help validate or further inform your understanding of the business environment and your role within it
- Include the people using your services, their families, staff, community groups and business partners, potential funding sources

- A stakeholder identifies that yours is the only transportation company that will come when it snows and/or the only company that will come to the door when it rains or snows and offer assistance getting to the vehicle.
- A stakeholder identifies yours is the only agency that makes an effort to match its personal attendant with clients that speak the same language and that permits a change in departure time with less than 36 hours notice.

Community Based Organizations



16

- Your agency provides personal assistance services, a group home provider that you have engaged with about your business, contacts you with concerns about their existing personal assistance agency. They are short-staffed in the evenings and thus forced to put residents to bed by 8:00pm. The group home wants to contract with your entity but are stuck in a contract.
- You contact the short-staffed personal assistance provider and offer them a short-term contract to fill evening hours. You tell the group home you are available when the existing contract expires.

- You are a nutrition services provider for various entities, including an adult day program. That adult day program is in negotiations with a managed care organization (MCO) to provide services and learns that the MCO also wants nutrition services. The day program contacts you and suggests a partnership so that together you offer a competitive service.

Stakeholder/Champion Engagement

18

Identify

Identify the individuals and entities with an interest in your business who will aid in business objectives (your stakeholders).



Plan

Plan how you and your staff will effectively communicate and engage with stakeholders so that they are willing and able to aid in business objectives.



Engage

Implement stakeholder engagement activities according to your plan.



Evaluate

Assess the impact of the stakeholder engagement, and restructure stakeholder engagement activities, if necessary.

Identify Potential Stakeholders



19

■ Payers

- Medicaid, SNFs, Community Mental Health Centers, adult day programs, MCOs, private insurers carriers, FFS-purchasers.

■ Community Partners

- Centers for Independent Living, disability advocacy orgs., orgs. representing specific ethnicity groups, social service agencies, non-profits, protection & advocacy, legal aid, providers, schools, churches, law enforcement, related businesses.

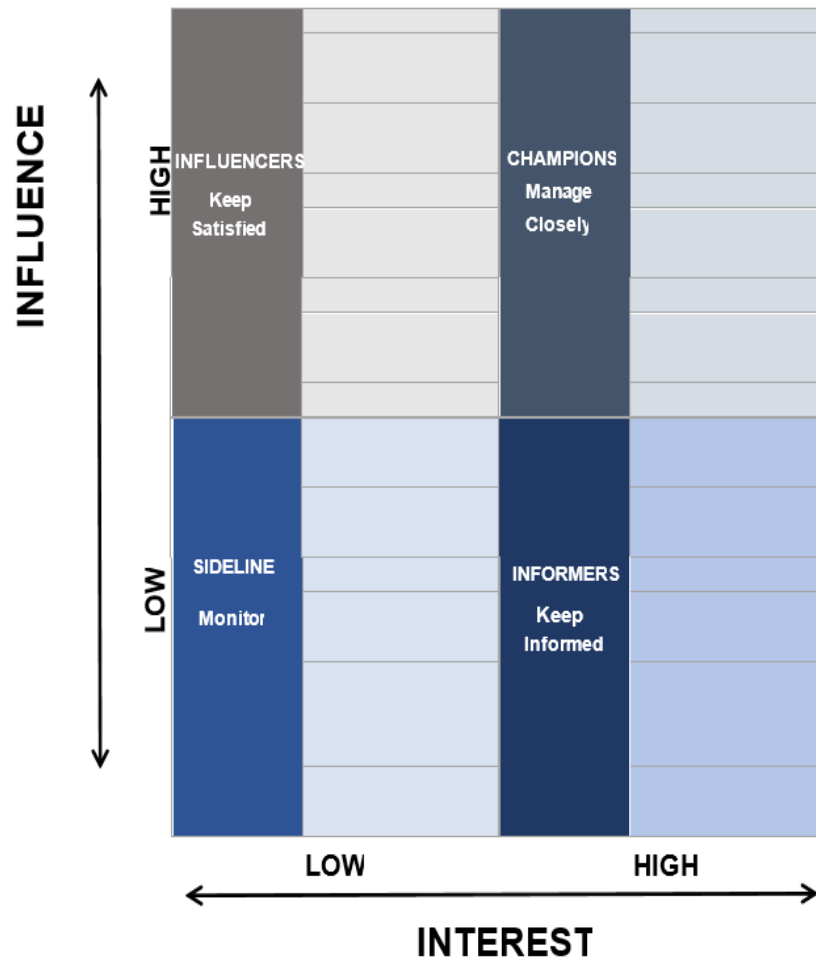
■ Utilizers

- Individual users, their family and caregivers, disability services providers,

■ Government Entities

- Mental health, Intellectual and/or Developmental Disabilities and minority outreach offices, state disability councils, state legislators, etc.

Interest and Influence



Identify Champions

Champion Name	Category (payer, regulator, user, etc.)	Potential Contribution (staff, money, technology, information, influence)	Familiarity (Current level of knowledge of our organization, efforts, systems change)	Level of commitment (support/oppose; to what extent; why)	Level of Interest/Influence

Prioritize the people and organizations who will have the most impact on your business

- Define how each stakeholder/champion will add value
- Define how you want them to participate
- Identify meaningful interactions for the engagement

Champions

- How will they specifically help your organization meet its objectives
- Do they have a resounding strength?

■ Methods

- Surveys
- Focus Groups
- One-on-One Discussions
 - Share:
 - What you learned during the environmental scan
 - Results of your SWOT analysis
 - Ask
 - What are you missing?
 - Do they see things differently?
 - What would they advise?

Engage

■ Payers

- Ask about their needs.
- Ask about gaps in services. Explore together how your services may fill those gaps.
- Ask them about their expectations.

■ Community Partners

- Identify common challenges, goals or desired outcomes.
- Identify areas for collaboration. Find the win-win and commit to helping all parties involved achieve their goals.

■ Utilizers of Services and/or Representatives

- Ask them about what they'd like to see in your organization – how to make the change successful.
- Ask them about their concerns.
- Follow-up on issues and questions, but don't make promises you can't keep.

■ Government Entities

- Review requests for proposal, contracts, regulations and any other guidance documents.
- Identify questions and brainstorm strategies to help meet the objectives of the delivery system.
- Vet your ideas with them and ask what they see as gaps and priorities.

Evaluate

25

- Were your objectives met
- What are any new objectives
- Who were the Low to High Influencers
- What actions created by-in
- What were barriers to stakeholder engagement
- Did you seek partner ideas for change/ improvement
- Do you need to add new stakeholders, as result of change

Planning to Plan

26

- Organization Vision
- Environmental Scan
- SWOT Analysis
- Champion Development

Monthly Webinar Series



27

- November 15, 2017*: Successful Organizational Change While Maintaining Your Mission
- December 20, 2017*: Developing Relationships with Potential Payers and Community Partners
- January 24, 2018: Understanding and Maximizing Your Financial Position
- February 28, 2018: Articulating Your Business Case
- March 28, 2018: Negotiating and Contracting

**Webinars usually held the 4th Wednesday of every month. November and December's webinars will be held the 3rd Wednesday of the month.*

Thank You!



<http://www.nasud.org/initiatives/business-acumen-disability-organizations-resource-center>



**BUSINESS
ACUMEN
CENTER**

**Providing Resources
to Sustain Disability
Organizations**

For more information, please visit: www.nasud.org

E-mail: businessacumen@nasud.org

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