LOOKING BACK/LOOKING AHEAD: SUSTAINING OUR WORK IN A CHANGING ENVIRONMENT

National Aging and Disability I&R/A Pre-Conference Summit
June 3, 2018

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Funding and Sustainability: Key Concerns for I&R/A Programs
National I&R/A survey findings: Top agency concerns

Top Issues Affecting I&R/A Organizations

- Funding/sustainability
- Limited resources to serve inquirers
- Changes to the LTSS delivery system
- Staffing
- Capacity for technology improvements
- Resource database
- Implementation of Medicaid managed care
- Partnerships with other agencies
- Serving caregivers
- Data collection capability
- Serving new populations
- Other
National I&R/A survey findings:
Trends in funding for ADRCs

Funding Trends for ADRC Activities

- Funding has been eliminated
- Funding has increased
- Funding has decreased
- Funding has stayed about the same
- Do not know

Percent of Respondents (N=267)
National I&R/A survey findings: Medicaid administrative claiming

ADRC/NWD Activities for Which States Seek Medicaid Administrative Claiming

- Medicaid outreach
- Options Counseling
- Medicaid application assistance
- Medicaid screening
- Referrals for Medicaid services
- Person-centered counseling
- Coordination of Medicaid services
- Medicaid-related staff training
- Monitoring of Medicaid services
- Functional assessment
- MMIS development
- Other
National I&R/A survey findings: Serving Medicaid consumers

Services Provided to Consumers Enrolled in a Medicaid HCBS Program

- Case management/care coordination
- Functional/needs assessment
- Meals program/service
- Personal care services
- Care transitions
- Homemaker/chore service
- Adult day program
- Respite
- Transportation
- Health and wellness programming
- Home modifications
- Disease management
- Other
- Exercise/fitness/physical activity programming

Percent of Respondents (N=98)
National I&R/A survey findings: Providing fee-based services

Fee-Based Services Offered to Private Pay Consumers

- Personal care services
- Case management/care coordination
- Meals program/service
- Homemaker/chore service
- Transportation
- Respite
- Home modifications
- Health and wellness programming
- Other
- Care transitions
- Personal emergency response systems (PERS)
- Disease management
- Functional/needs assessment
- Adult day program
- Representative payee program
- Exercise/fitness/physical activity programming
- Long-term care planning

Percent of Respondents (N=58)
National I&R/A survey findings: Sustainability strategies

- Investments in technology and data capacity; **modernizing technology**
- **Medicaid billing and claiming**
- Cost sharing (e.g. cost share Options Counseling program), fee for service
- Modernizing business practices, streamlining systems, seeking efficiencies in business practices, cross-training staff
- **Community partnerships** and collaboration, working together on common goals, collaborating for grant funding
- **Marketing, branding**, leveraging social media
- Serving new populations (for example, veterans)
- **Contracting with health care entities** (to provide supportive services), addressing social determinants of health, care transitions, partnering with local hospitals
- Innovation and creativity
Developing business acumen: Where is help needed?

Developing Business Acumen: Where Is Help Needed?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent of Respondents (N=41)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing business systems</td>
<td>80%</td>
</tr>
<tr>
<td>Pricing services</td>
<td>70%</td>
</tr>
<tr>
<td>Identifying needed services</td>
<td>60%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
</tbody>
</table>
Developing business acumen: Where do agencies seek help?

Resources for Increasing Business Acumen

Percent of Respondents (N=38)

- Webinars
- Conferences
- National Associations
- HCBS Business Acumen Center
- Aging and Disability Business Institute
- Other
Looking Back/Looking Ahead

- How do we maintain our strong foundations?
- How do we respond to growing needs?
- How do we adapt to changes in aging and disability services and funding?
- How do we create value for our work?
- How do we show the value of this work?
Business Acumen for Disability Organizations Grant
Grant Overview

■ 3 years
  ▶ October 1, 2016 – September 30, 2019

■ Funded by the Administration for Community Living

■ Goal/Vision:
  ▶ Build the capacity of disability community organizations to contract with integrated care and other health sector entities
  ▶ Improve the ability of disability networks to act as active stakeholders in the development and implementation of integrated systems within their state
Local organizations that offer community living services and supports to advance the health, well-being, independence, and community participation of older adults and people with disabilities and may include:

- Aging and Disability Resource Centers
- Behavioral health organizations,
- Centers for Independent Living,
- Developmental disability organizations,
- Protection and Advocacy Agencies,
- University Centers for Excellence in Developmental Disabilities Education, Research & Service
- Faith-based organizations,
- Area Agencies on Aging,
- Aging services organizations,
- Native American tribal organizations,
- Nutrition program providers, and
- Other local service providers for persons with disabilities and/or older adults
Disability Network Business
Acumen Grant Activities

- Develop baseline knowledge of current community-based organizations
- Provide broad-based training and technical assistance for disability networks to build their capacity
- Convene and provide targeted technical assistance utilizing a learning collaborative model
- Engage integrated care organizations, managed care plans, and other health care entities regarding the needs of consumers and the roles of CBOs
What is Business Acumen?

Keenness and quickness in dealing with and understanding a business situation in a manner that is likely to lead to a good outcome.
How Does Business Acumen Relate to Integrated Care?

- Effective Leadership
- Partnerships
- Business Planning & Financial Sustainability
- Quality Assurance
- Centralized, Coordinated Logistical Processes
- Adequate Delivery Infrastructure

Managing Chronic Conditions
Activating Beneficiaries
Avoiding Long-Term Residential Stays
Preventing Hospital (Re)Admission
They seek partnerships with CBOs to...

- Offer a local approach that fosters community integration and quality of life
- Enable people with disabilities to remain connected to their community
- Provide high quality that promotes health and social outcomes that can be demonstrated through data
Community Based Organizations tell us...

- To engage in these partnerships with MCOs, they need support...
  - To articulate their value proposition
  - To know who to connect with
  - How to market their services
  - How to price their services
  - How to meet contract expectations
Why Business Acumen Matters

Accountable Care Organizations (ACOs)

Community-Based Care Transitions Program (CCTP)

Health Homes

Integrated Care Opportunities

State Innovation Models

Medicaid Managed LTSS (MLTSS)
Why Business Acumen for CBOs?

- CBOs can add value to health care providers and payers -- they represent critical eyes & ears in the home, and supports that can keep people living in the community
  - Help with member location (for health plans), engagement and retention
- These partnerships involve culture change – both for CBOs and health care providers/payers
  - Language
  - Buy-in at all levels
Why Business Acumen for CBOs?

- It is critical to establish work flows and referral processes from the outset that foster partnership
  - Increase access to needed services for plan members, build volume for CBOs, and increased staff efficiencies for CBOs and health care entities alike
- Data exchange/communication is a two-way street
- Opportunities for growth for CBOs:
  - Continuous quality improvement, infrastructure & information technology, outcomes data
- In the end this work can lead to systems change and increased person-centeredness
Lessons Learned: Everyone Has to Change!

Healthcare Changes
- IT supports targeting/referral
- Programming to support data exchange
- Champions at all levels
- Workflow changes
- Patient/member motivation
- Share outcomes data
- Respect CBO expertise

CBO Changes:
- Better IT systems
- Better IT security
- More insurance
- Accreditation
- Provider #
- Motivate health plan to refer & work with us
- Workflow
- Understand health plan regulations
- Motivate patients & participants
- Address barriers for patients

Volume is a prerequisite for sustainability

(Source: Partners in Care Foundation/Partners at Home)
Purpose: To determine the business acumen needs of disability community-based organizations across the country

Gathered feedback from Disability CBOs, State Agencies, and Integrated Care Entities

Asked about...
- CBO Familiarity with Integrated Care Terminology
- Experience with Integrated Care
- Organization’s Current Capabilities
What did we find?

CBO’s are not familiar with terminology used in integrated care

<table>
<thead>
<tr>
<th>Business Concepts</th>
<th>Not at all to Somewhat Familiar</th>
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</thead>
<tbody>
<tr>
<td>Actuarially Sound Rates</td>
<td>74</td>
</tr>
<tr>
<td>Stop/Loss Ratio</td>
<td>72.4</td>
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<tr>
<td>Risk Based Contracting</td>
<td>68</td>
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<tr>
<td>Value-Based Purchasing</td>
<td>67.7</td>
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<tr>
<td>Per Member Payment</td>
<td>61.4</td>
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<tr>
<td>Per Member Payment Methodology</td>
<td>61.4</td>
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<tr>
<td>Network Adequacy</td>
<td>58.3</td>
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<tr>
<td>Risk Adjustment</td>
<td>57.6</td>
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<tr>
<td>Analytics</td>
<td>57.4</td>
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<tr>
<td>Workforce Credentialing</td>
<td>55.8</td>
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<tr>
<td>Case Navigators</td>
<td>54.1</td>
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<tr>
<td>Network Development</td>
<td>53.5</td>
</tr>
<tr>
<td>Social Determinants of Health</td>
<td>52</td>
</tr>
<tr>
<td>Health Outcomes Metrics</td>
<td>51.6</td>
</tr>
<tr>
<td>Performance Based Contracting</td>
<td>50.2</td>
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</tbody>
</table>

Disability CBO’s had different experiences during their state transition to MLTSS

- Centers for Independent Living
- Developmental Disability Organizations
What’s important?

<table>
<thead>
<tr>
<th>Community Based Organizations</th>
<th>Managed Care Organizations</th>
<th>States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical, Data-Driven</td>
<td>Consumer Engagement</td>
<td>Communication Skills</td>
</tr>
<tr>
<td>Decision-Making</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer Satisfaction</td>
<td>Consumer Satisfaction</td>
<td>Articulating your Value</td>
</tr>
<tr>
<td>Consumer Engagement</td>
<td>Innovative Thinking</td>
<td>Building Essential Infrastructure Support</td>
</tr>
<tr>
<td>Understanding Customer Needs</td>
<td>Managing Risk in a Managed Care Environment</td>
<td>Consumer Engagement</td>
</tr>
<tr>
<td>Articulating your Value</td>
<td>Measures (e.g. outcomes, consumer satisfaction)</td>
<td>Consumer Satisfaction</td>
</tr>
</tbody>
</table>

Disability CBO’s desire training and resources

**Training**
- Value of partnering with CBOs
- Value-based services
- Data driven outcomes
- Quality expectations
- Policies and procedures that align with integrated care entities
- Sharing of best/promising practices
- Negotiations
- Terminology

**Resources**
- Business plan/model
- Data collection program
- Consumer satisfaction
- Contracting templates
- Health Information Technology – funding, integration
What skills and expertise are most important *and* how strong are you in those skills:

<table>
<thead>
<tr>
<th>Skill</th>
<th>Importance 5 - Very Important (%)</th>
<th>Demonstrated Capabilities 5 - Very Strong (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical, Data-Driven Decision-Making</td>
<td>87</td>
<td>10.8</td>
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<tr>
<td>Consumer Satisfaction</td>
<td>82.1</td>
<td>52.2</td>
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<tr>
<td>Consumer Engagement</td>
<td>73.2</td>
<td>42.5</td>
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<tr>
<td>Understanding Customer Needs</td>
<td>72.9</td>
<td>48.1</td>
</tr>
<tr>
<td>Articulating your Value</td>
<td>65.3</td>
<td>18.8</td>
</tr>
</tbody>
</table>
What skills and expertise are community based organizations the least strong in:

<table>
<thead>
<tr>
<th>Skill</th>
<th>Importance 5 - Very Important (%)</th>
<th>Demonstrated Capabilities 5 - Very Strong (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluating Competition</td>
<td>24.1</td>
<td>4.9</td>
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<tr>
<td>Effective Sales Techniques</td>
<td>29.4</td>
<td>5.9</td>
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<tr>
<td>Developing Information Technology Systems</td>
<td>45.5</td>
<td>7.6</td>
</tr>
<tr>
<td>Understanding and Articulating Return on Investment</td>
<td>38.8</td>
<td>7.6</td>
</tr>
<tr>
<td>Pricing and Rate Determination</td>
<td>46.6</td>
<td>8.3</td>
</tr>
</tbody>
</table>
Where is there the greatest spread between what is important, yet community based organizations report the need for increased capability:

<table>
<thead>
<tr>
<th>Area</th>
<th>Importance 5 - Very Important (%)</th>
<th>Demonstrated Capabilities 5 - Very Strong (%)</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical, Data-Driven Decision-Making</td>
<td>87</td>
<td>10.8</td>
<td>53.88</td>
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<tr>
<td>Articulating your Value</td>
<td>65.3</td>
<td>18.8</td>
<td>32.88</td>
</tr>
<tr>
<td>Building Essential Infrastructure Support</td>
<td>56.1</td>
<td>13</td>
<td>30.48</td>
</tr>
<tr>
<td>Developing Quality and Performance Systems</td>
<td>51.1</td>
<td>8.6</td>
<td>30.05</td>
</tr>
<tr>
<td>Making the Business Case for your Services</td>
<td>51.1</td>
<td>10.9</td>
<td>28.43</td>
</tr>
</tbody>
</table>
Listen, Learn and Disseminate

Environmental Scan and Needs Assessment

- Resources
- Learning Collaboratives
- Technical Assistance
A Roadmap

No two paths are identical
Prepare
- Organization Vision
- Environmental Scan
- SWOT Analysis
- Champion Development

Plan
- Use information to steer the organization
  - Business Intelligence/Data analysis
  - Strategic Planning

Execute
- Developing and sustaining relationships and partnerships
- Negotiating and contracting
- Risk Management

Monitor/Evaluate
- Continuous quality improvement
- Compliance - meeting contract expectations
- Modifying approaches
Business Acumen
Learning Collaborative

Maryland
Missouri
New Hampshire
New York
Texas
Business Development Learning Collaborative

Illinois

Minnesota

Virginia
Contest to obtain stories that:

- highlight a strategy that was used to improve the financial position of disability CBO.
- are relevant and replicable to disability CBOs navigating a changing environment.
- demonstrates a positive impact on the persons served.
- demonstrates a positive impact on the administration and/or delivery of the CBOs services.
- improves the delivery and accessibility of the CBOs services to a diverse range of inquirers.
Stories from the Field Winners

- United Disabilities Services (UDS), a non-profit organization committed to serving people with disabilities in Pennsylvania.
  - Developed a quality management program, that includes multiple measures, to help build their value proposition.

- Area Agency on Aging District 7 (AAA7), a AAA that serves individuals of all ages and disability types who reside in southern Ohio.
  - Developed a bid to provide case management services, and successfully became a subcontractor for a managed care company in 2014.

- Community Options Enterprises, a subsidiary of Community Options, a national non-profit organization. Community Options Enterprises.
  - Developed the Daily Plan It, a complete office, conference, and copy center that offers office rental space or virtual tenancy to a variety of businesses. The Daily Plan It which provides an avenue for people with disabilities to work and is a self-sustaining business model with a hybrid payer structure, where customer purchased services and office rentals support the cost of operations.
- Business Acumen 101
- Business Acumen Toolkit
- Stories from the Field

http://www.hcbsbusinessacumen.org/webinars.html
2017

- UCEDD TA Institute
- ANCOR
- NASUAD MLTSS Symposium and Spring Meeting
- Medicaid Managed Care Conference
- NASDDDS 2017 Directors Forum & Mid-Year Conference
- NDRN Conference
- NCIL Conference
- N4A Conference
- NASUAD HCBS Conference
- AUCD Conference
- PA Provider Association

2018

- American Society on Aging Annual Conference
- LTQA Aging Well Hub: Technology Summit
  Transforming the Experience of Care in the Home
- ANCOR Annual Conference
- Charting the LifeCourse Showcase
- NASUAD Spring Meeting
- AIRS Conference
- NASDDDS Directors Forum & Mid-Year Conference
- NDRN Annual Conference
- NCIL Annual Conference
- N4A Conference
- Reinventing Quality 2018
- HCBS Conference
- NASDDDS Directors Forum & Annual Conference
- AUCD Annual Conference
Resources, Technical Assistance and More!

- Data Collection
  - Environmental Scan and Needs Assessment
  - Stories from the Field
- Webinars
- Website - hcbsbusinessacumen.org
- Two Learning Collaborative
  - Business Acumen - 5 State Teams
  - Business Development – 3 State Teams
- Toolkit & Other Resources
- NASUADiQ
HCBSBusinessAcumen.org

Developed in collaboration with partners in Fall 2017

Let’s take a tour!
We are pleased to announce the release of the first chapter of the Roadmap to Financial and Programmatic Sustainability for Community-Based Organizations. Click here to access Step 1: Prepare- Understand the Business Environment and Your Place within It.

About Us

The HCBS Business Acumen Center equips disability community-based organizations (CBOs) with business resources, information, and training that promotes sustainability in a changing environment. Collectively, these tools support the development of business relationships between disability CBOs and health plans, integrated health care entities and other payers that result in positive outcomes for individuals with disabilities. While the HCBS Business Acumen Center is funded by a grant from the Administration for Community Living, the HCBS
What We Offer

- Pre-recorded and live webinars
- Documents and guides
- Examples of promising practices
- Peer-to-Peer exchanges
- Telephone and e-mail assistance

How You Can Get Involved

- Access and contribute resources to the HCBS Business Acumen Center
- Share your experiences developing new relationships with payers, partners, and others
- Serve as a peer resource to other CBOs building or modernizing their business
Our partners are leading national disability leaders who lend their expertise to support the HCBS Business Acumen Center. Our partners include:

- National Council on Independent Living (NCIL)
- American Network of Community Options and Resources (ANCOR)
- American Association on Health and Disability (AAHD)
- National Disability Rights Network (NDRN)
- University of Minnesota
The rapid expansion of Medicaid managed long term services and supports (MLTSS) and other efforts to integrate healthcare and long-term services and supports is creating new, exciting and yet challenging opportunities for CBOs seeking to work within these new program designs. These new approaches mean that CBOs need to think differently about the services they offer, the customers they serve, and the way they demonstrate the value they add to services and supports. Instead of contracting directly with government funders, CBOs are now negotiating contracts with hospitals, health systems, accountable care organizations (ACOs), health plans, and other integrated care entities.

To understand the needs of the disability network community, the HCBS Business Acumen Center conducted an environmental scan of the business acumen of the disability network from April 2017 through May 2017.

Responses were solicited from the following three categories, each with its own unique survey:

- Community Based Organizations (CBOs).
- Managed Care Organizations (MCOs), Accountable Care Organizations (ACOs), and other healthcare and long-term services and supports payers.
- States currently operating or planning to implement a managed long-term services and supports (MLTSS) program.
Resources: Learning Collaboratives

The HCBS Business Acumen Center's first Learning Collaborative brings together state teams comprised of state agencies, community-based organizations (CBOs) serving persons with disabilities, integrated healthcare entities and other organizations to work together to develop and implement business-related strategies to state-specific challenges to integrating long-term services and supports and healthcare services. This work will focus on developing the business acumen of CBOs so that they are prepared to work within a changing business environment.

Learn More About the State Teams.

Each of the five state teams includes at least one state agency and CBO serving persons with disabilities (physical, intellectual and/or developmental). Most also include an integrated healthcare entity or other organization dedicated to the sustainability of CBOs serving people with disabilities. The five state teams represent Maryland, Missouri, New Hampshire, New York and Texas. Each state team is collaboratively working together on an overall aim. Below you can read more information about each state.
The HCBS Business Acumen Center and its partners are developing a toolkit to prepare community-based organizations (CBOs) to contract with integrated health care entities and provide tools and resources to help expand the ways CBOs do business. The toolkit is being released chapter by chapter. Here you can find each chapter in the toolkit, as they are released, as well as resources by category.

**Toolkit:**

**Step 1: Prepare**

*Understand the Business Environment and Your Place within It*
The Business Acumen Center hosts a webinar on a monthly basis concerning topics of interest to those who work in the field. The PowerPoint presentation, audio recording, and transcript from our webinars can be found in our webinar archive.

**Upcoming Webinar:**

More Information Coming Soon!
HCBS.org, managed by NASUAD, is the premier clearinghouse promoting the development and expansion of home and community-based services by gathering resources and tools for research, policy making and program development into a one-stop online library. HCBS.org provides program developers, policy makers, researchers, funding organizations, advocacy groups, and others engaged in system change across the country with timely access to information, tools, data, and state-produced resources on promising practices.

The HCBS Clearinghouse includes resources about the development of business relationships between community-based organizations that serve persons with disabilities and health plans and other integrated health services. To find all resources related to HCBS business acumen, conduct a keyword search of business acumen. You may also search for specific topics such as: communication planning, engaging boards, negotiating, contracting, culture change, partnerships, pricing structures, project planning, project management, strategic planning, sustainability, quality.
CBOs serving people with disabilities are doing amazing things within their communities to promote and pursue integrated care. As a result, the most powerful resources within the HCBS Business Acumen Resource Center is YOU! By sharing your success stories, lessons learned, and useful tools & resources, we can all work together to build a sustainable future for disability organizations. Please submit any section below that relates to you, contact information is required in order to submit any relevant information.

Contact Information

* INDICATES REQUIRED FIELD

NAME *

First       Last

EMAIL *

PHONE NUMBER *
Contact

Would You Like to Connect with Us?

Contact: Erica Lindquist, Senior Director HCBS Business Acumen

Email: businessacumen@nasuad.org

Phone: 202-898-2578

Address: 1201 15th St. NW, Suite 350, Washington, DC 20005

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Or Call: 202.898.2583