



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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Presenters



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- Nanette Relave, Senior Director, National I&R Support Center, NASUAD
- Erica Lindquist, Senior Director of Business Acumen, NASUAD
- Samantha Gardner, Policy & Communications Analyst, NASUAD

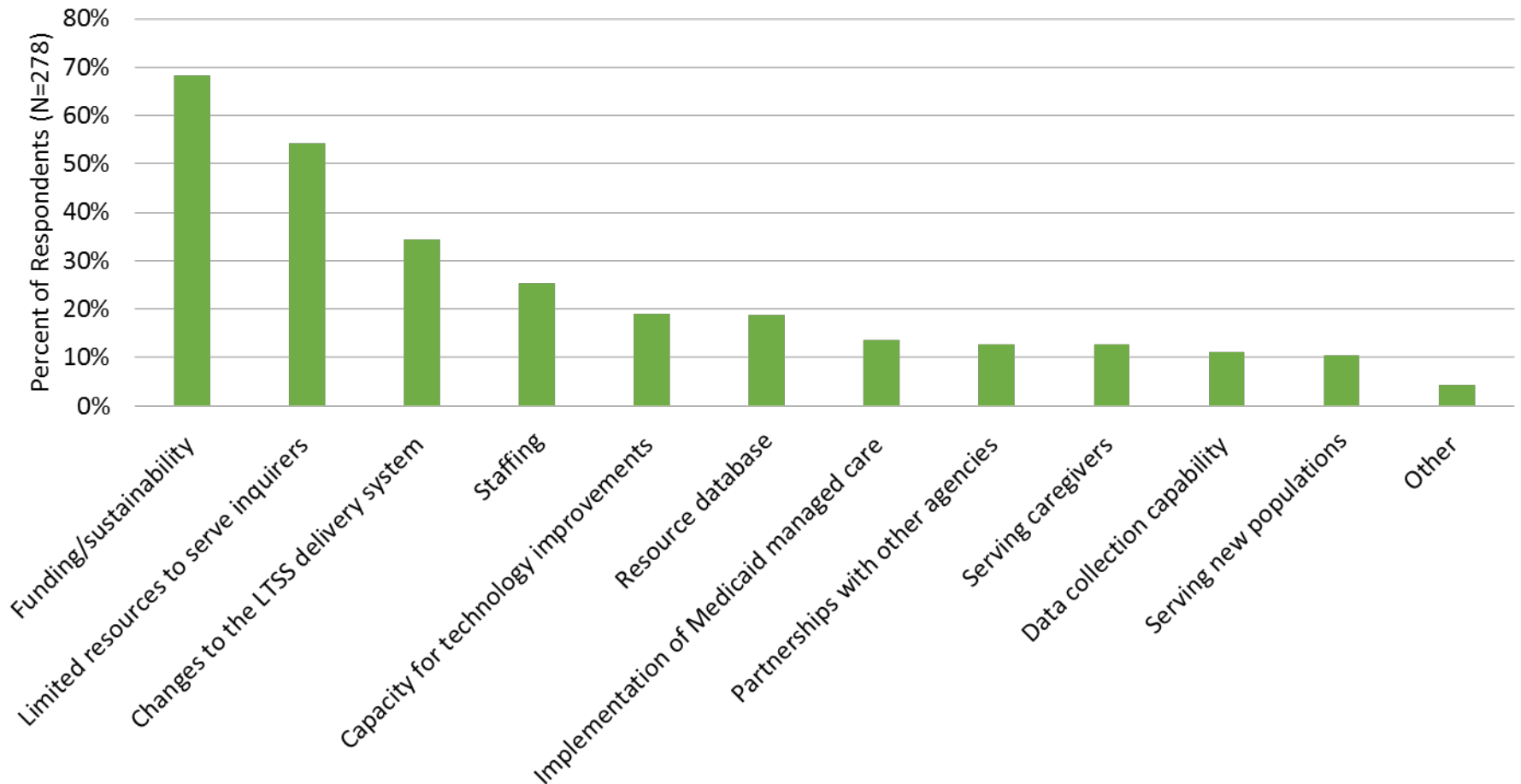
Setting the Stage

Funding and Sustainability: Key Concerns for
I&R/A Programs

National I&R/A survey findings: Top agency concerns

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Top Issues Affecting I&R/A Organizations

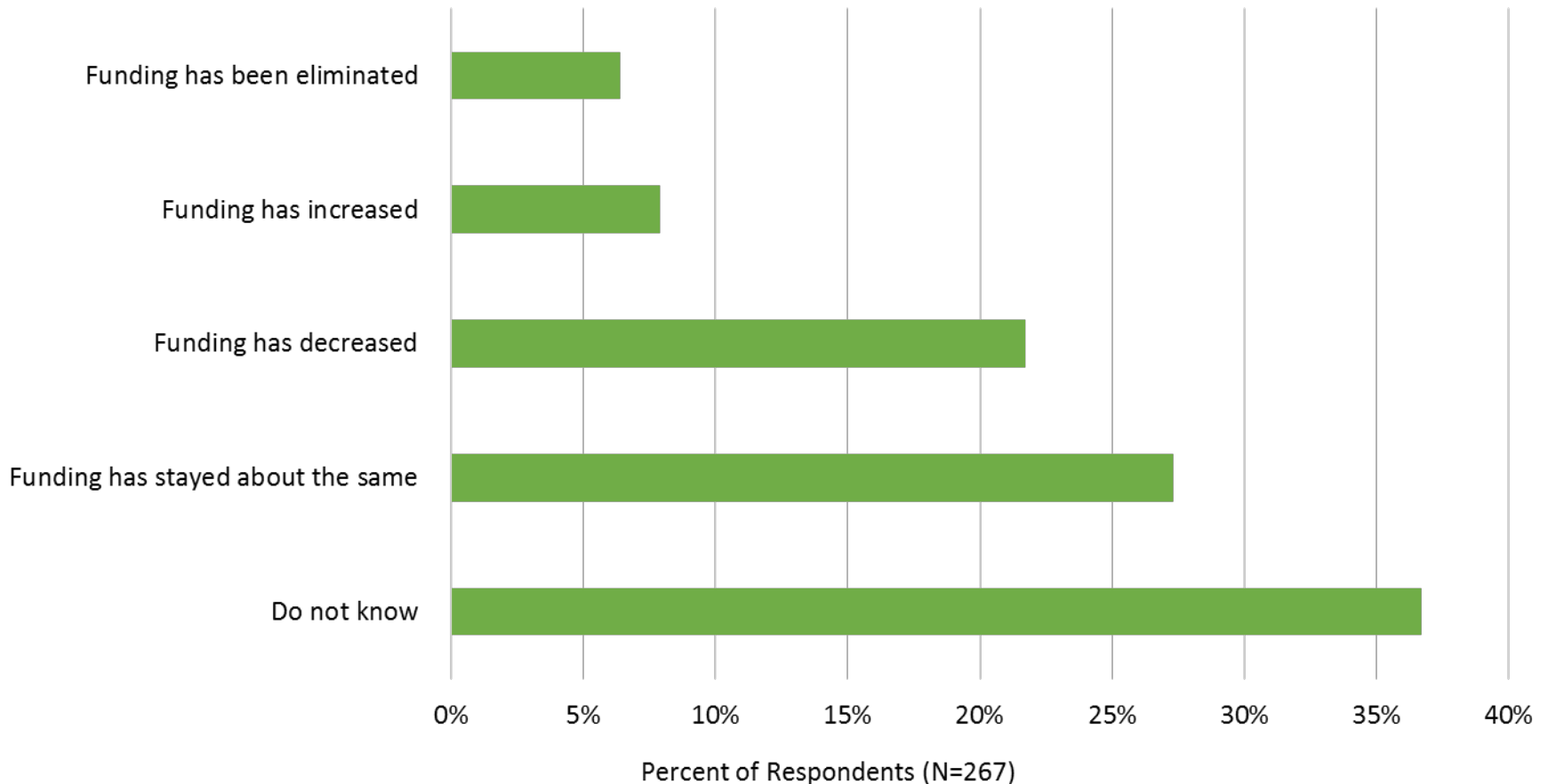


National I&R/A survey findings: Trends in funding for ADRCs



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Funding Trends for ADRC Activities

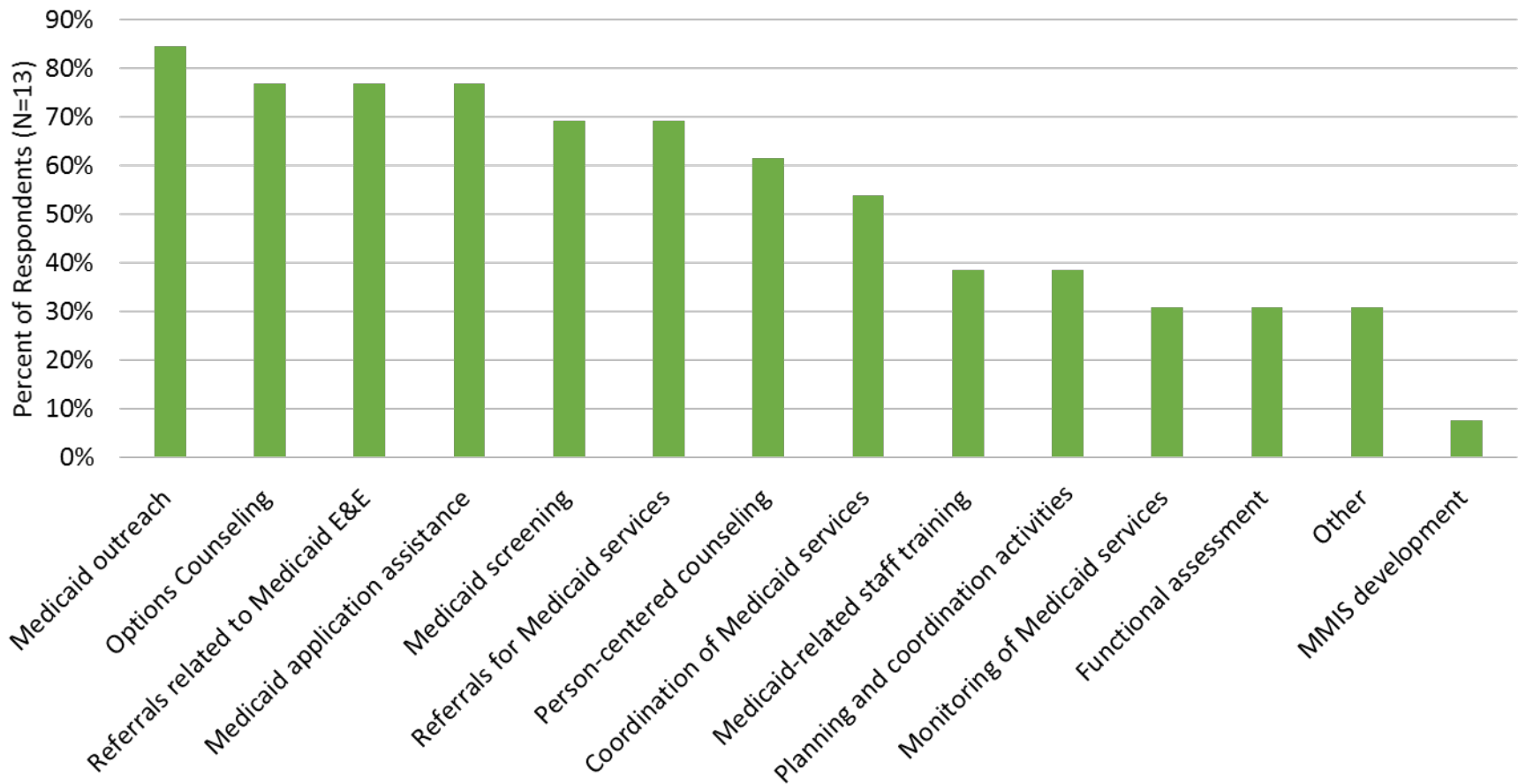


National I&R/A survey findings: Medicaid administrative claiming



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ADRC/NWD Activities for Which States Seek Medicaid Administrative Claiming

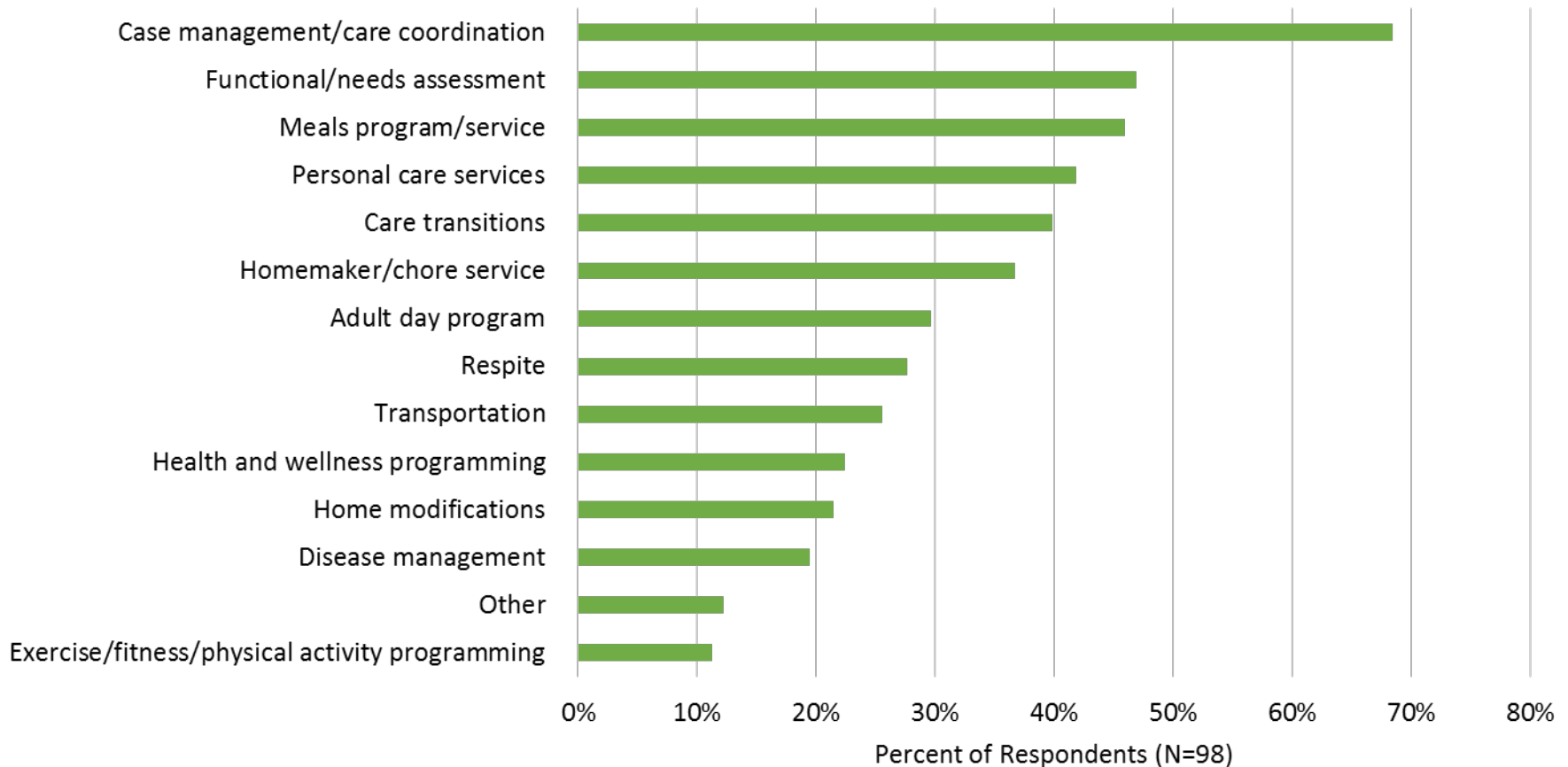


National I&R/A survey findings: Serving Medicaid consumers



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Services Provided to Consumers Enrolled in a Medicaid HCBS Program

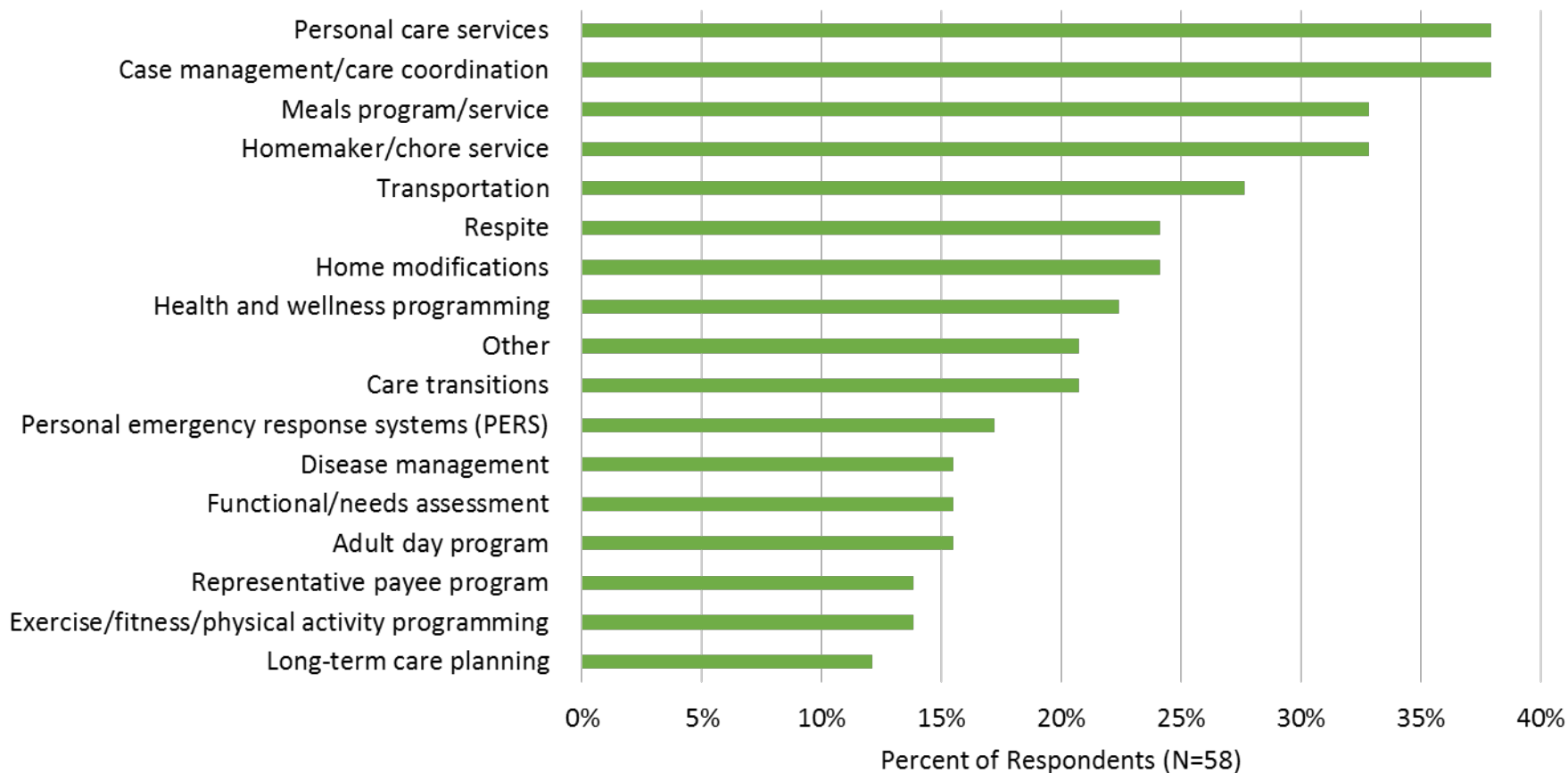


National I&R/A survey findings: Providing fee-based services



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Fee-Based Services Offered to Private Pay Consumers



National I&R/A survey findings: Sustainability strategies



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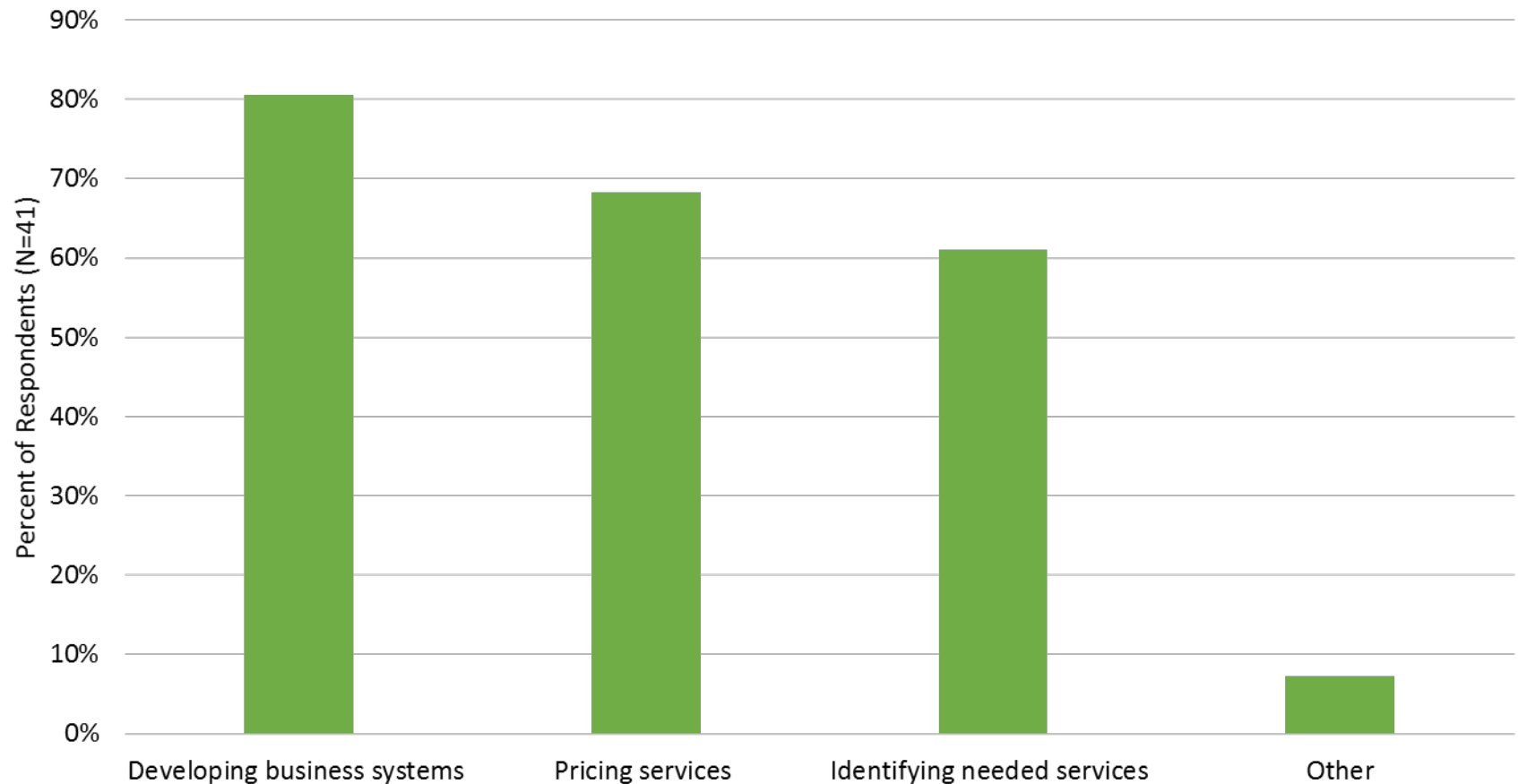
- Investments in technology and data capacity; **modernizing technology**
- **Medicaid billing and claiming**
- Cost sharing (e.g. cost share Options Counseling program), fee for service
- Modernizing business practices, streamlining systems, seeking efficiencies in business practices, cross-training 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?



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Developing Business Acumen: Where Is Help Needed?

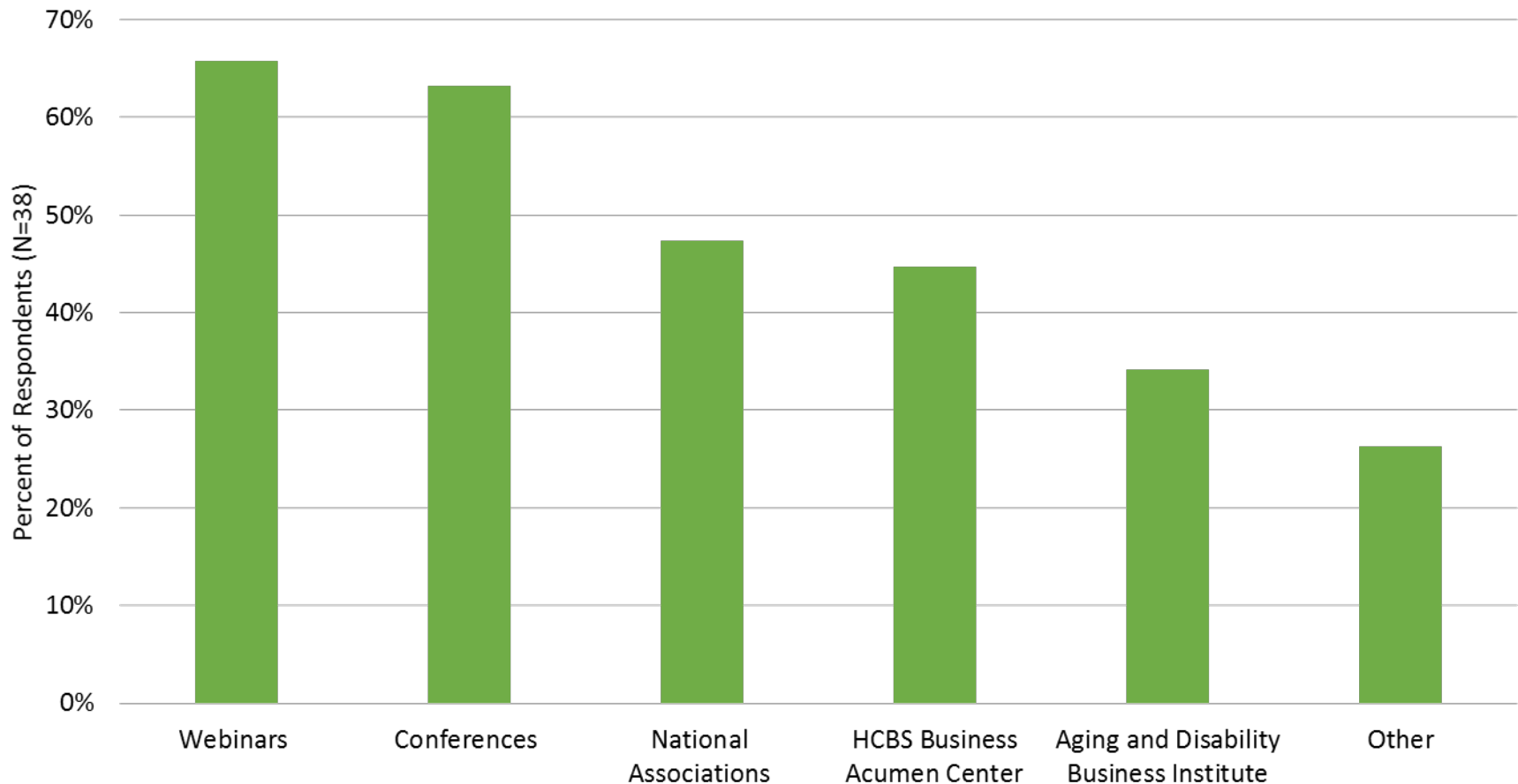


Developing business acumen: Where do agencies seek help?



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Resources for Increasing Business Acumen



Looking Back/Looking Ahead



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- 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



Business
Acumen for
Disability
Organizations

- 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

Community Based Organizations..



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- 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

Business Acumen Grant Partners



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Managed by:



Funded by:



Disability Network Business Acumen Grant Activities



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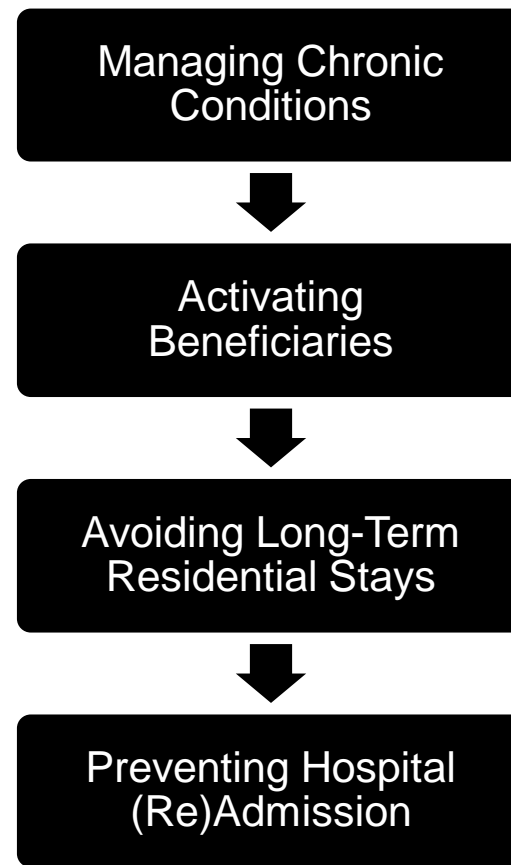
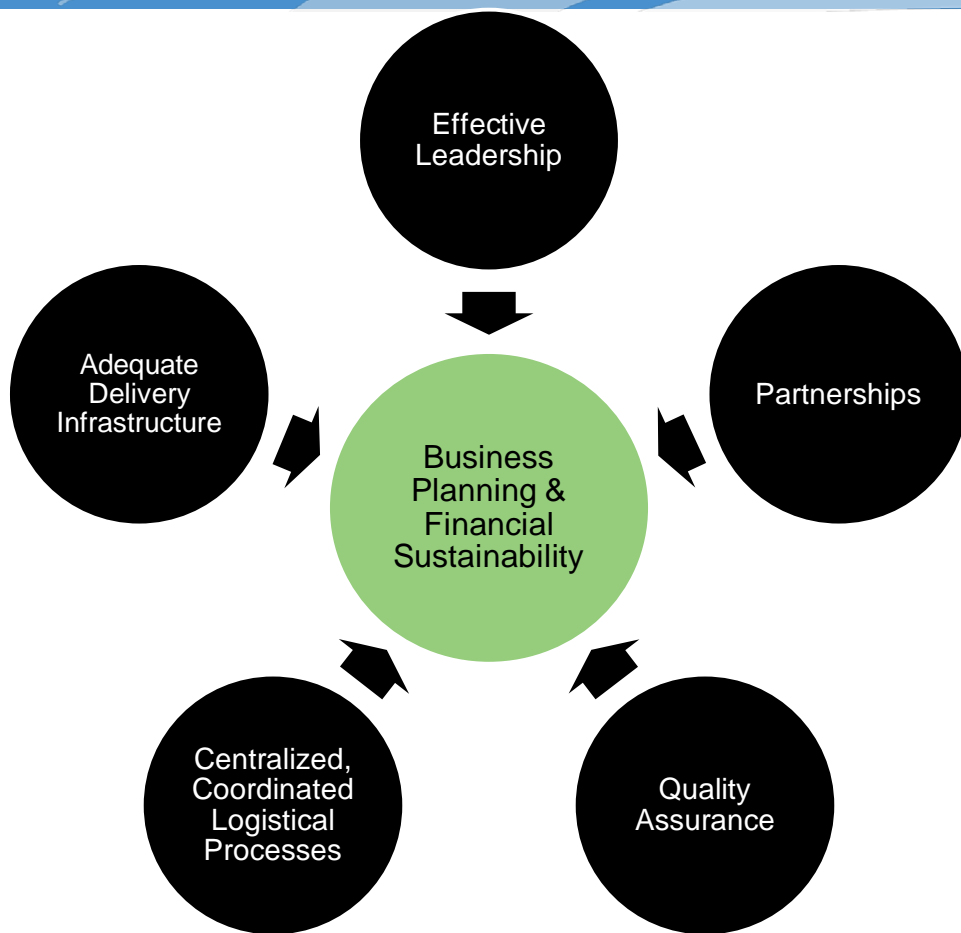
- Develop baseline knowledge of current community-based organizations
- Provide broad-based training and technical assistance for disability networks to build their capacity
- Convene and provide targeted technical assistance utilizing a learning collaborative model
- Engage integrated care organizations, 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?



What MLTSS health plans tell us ...



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- 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

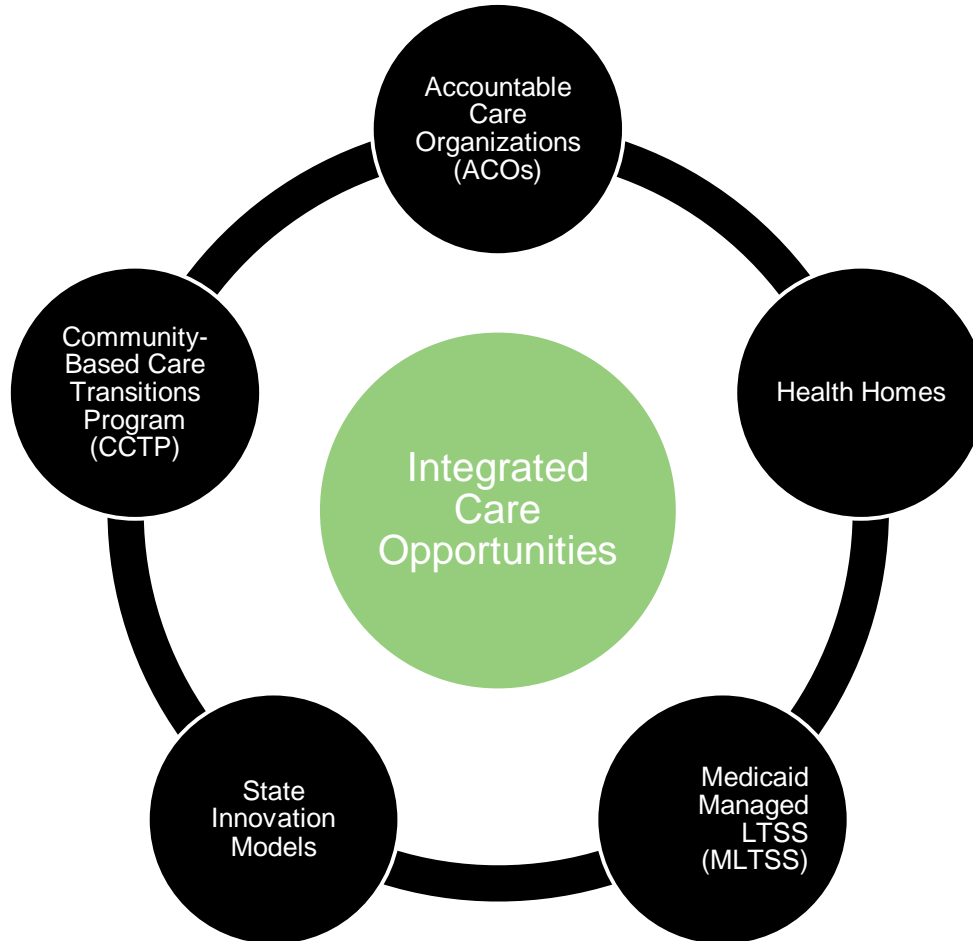
Community Based Organizations tell us...



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- 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



Why Business Acumen for CBOs?



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- 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?



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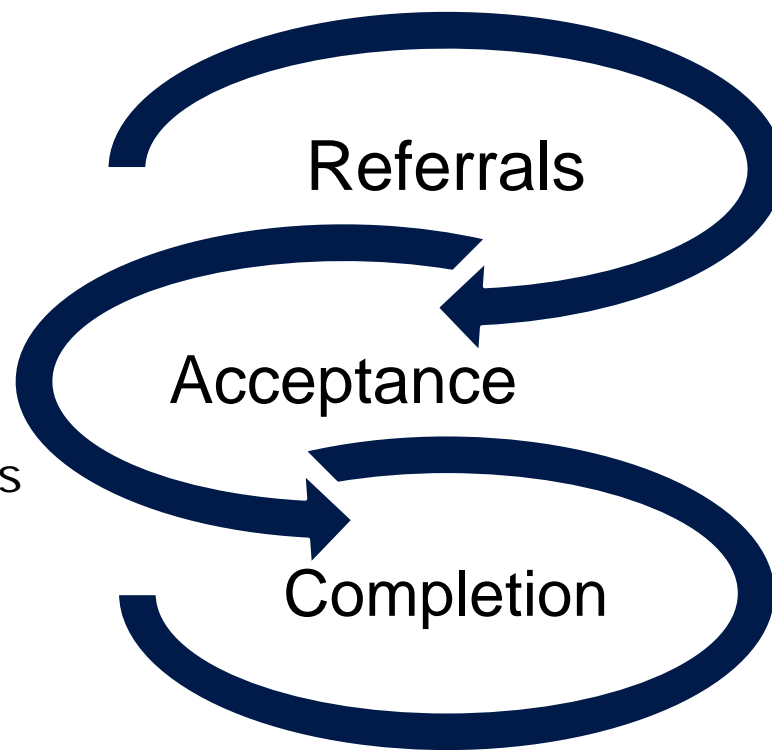
- It is critical to establish work flows and referral processes from the outset that foster partnership
 - ▣ Increase access to needed services for plan members, build volume for CBOs, and increased staff efficiencies for CBOs and health care entities alike
- Data exchange/communication is a two-way 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

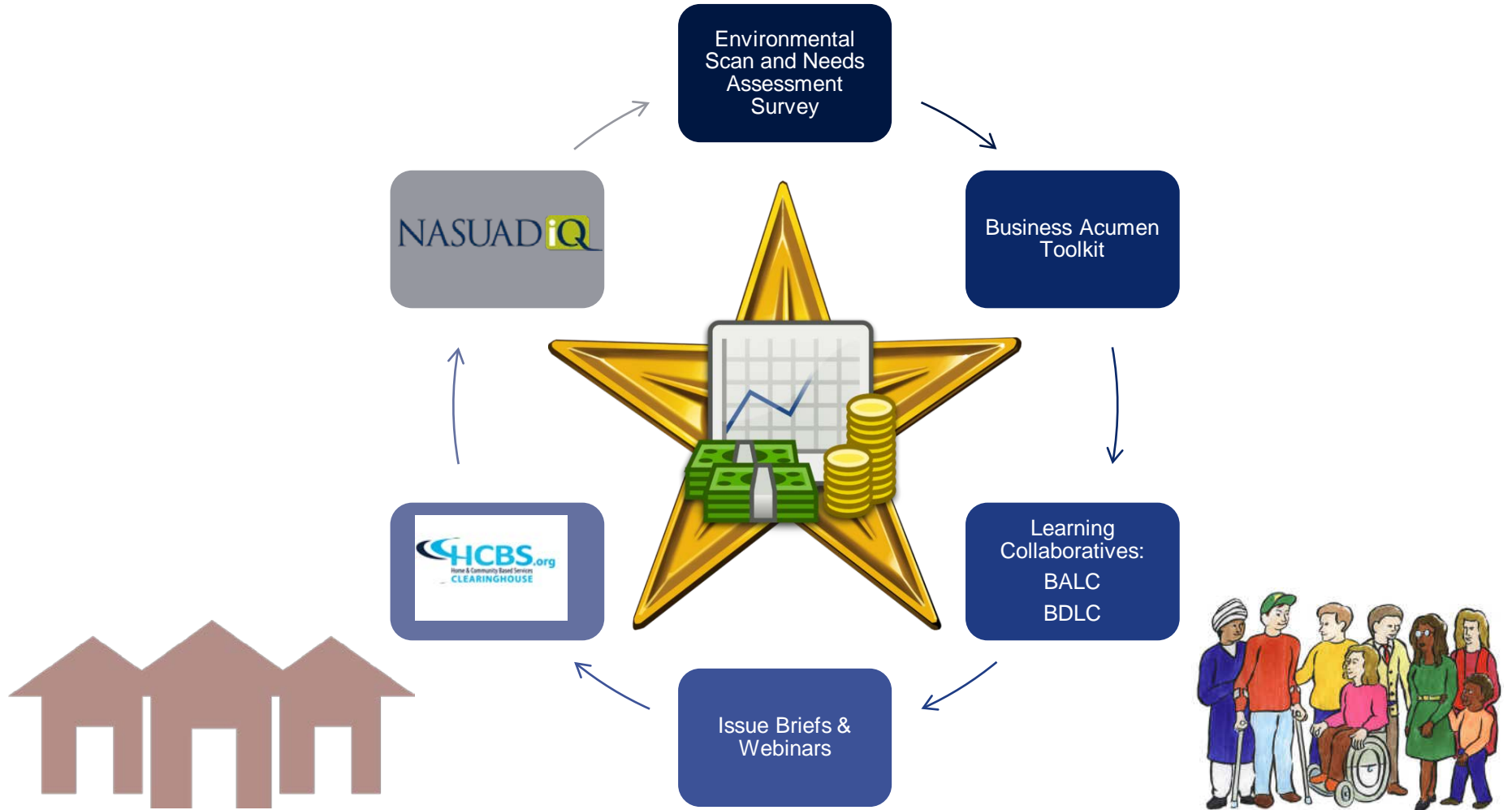


***Volume is a prerequisite
for sustainability***

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

Sustainability via Business Acumen



Environmental Scan and Needs Assessment Survey



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- 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

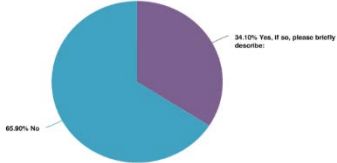
What did we find?

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

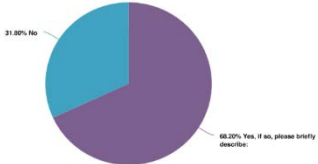


Business Concepts	Not at all to Somewhat Familiar
Actuarially Sound Rates	74
Stop/Loss Ratio	72.4
Risk Based Contracting	68
Value-Based Purchasing	67.7
Per Member Payment Methodology	61.4
Network Adequacy	58.3
Risk Adjustment	57.6
Analytics	57.4
Workforce Credentialing	55.8
Case Navigators	54.1
Network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

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



Centers for Independent Living



Developmental Disability Organizations

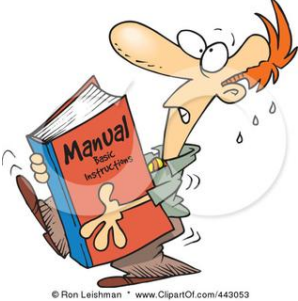
What's important?

CBO's, MCO's and States generally value the same skills and expertise

Disability CBO's desire training and resources



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



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

Opportunities for Skill Development/Enhancement in CBOs



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What skills and expertise are most important *and* how strong are you in those skills:

	Importance 5 - Very Important (%)	Demonstrated Capabilities 5 - Very Strong (%)
Analytical, Data-Driven Decision-Making	87	10.8
Consumer Satisfaction	82.1	52.2
Consumer Engagement	73.2	42.5
Understanding Customer Needs	72.9	48.1
Articulating your Value	65.3	18.8

Opportunities for Skill Development/ Enhancement in CBOs



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What skills and expertise are community based organizations the least strong in:

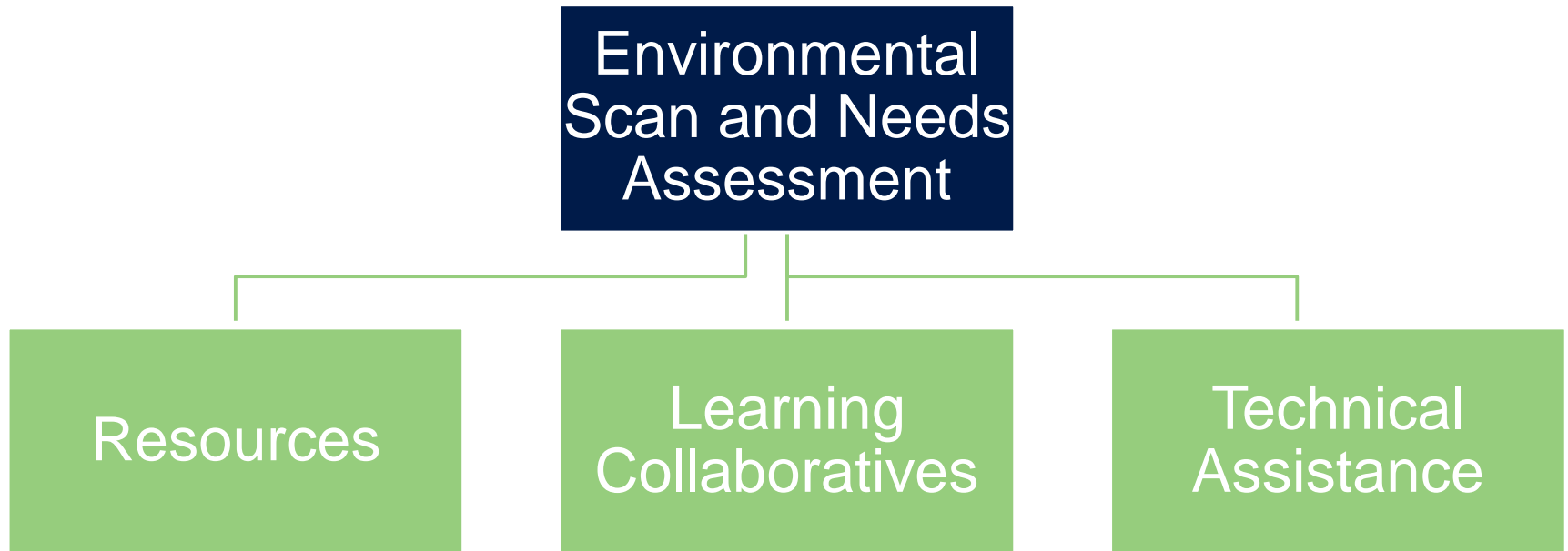
	Importance 5 - Very Important (%)	Demonstrated Capabilities 5 - Very Strong (%)
Evaluating Competition	24.1	4.9
Effective Sales Techniques	29.4	5.9
Developing Information Technology Systems	45.5	7.6
Understanding and Articulating Return on Investment	38.8	7.6
Pricing and Rate Determination	46.6	8.3

Perception of Strength vs. Importance

Where is there the greatest spread between what is important, yet community based organizations report the need for increased capability:

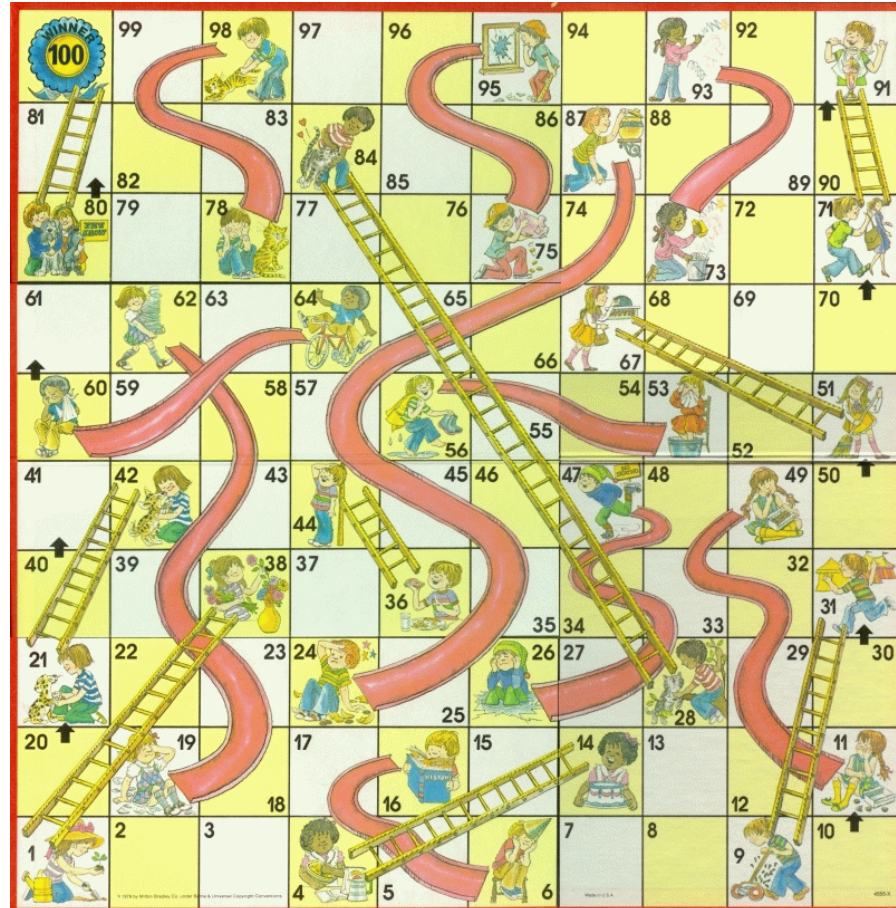
	Importance 5 - Very Important (%)	Demonstrated Capabilities 5 - Very Strong (%)	Standard Deviation
Analytical, Data-Driven Decision-Making	87	10.8	53.88
Articulating your Value	65.3	18.8	32.88
Building Essential Infrastructure Support	56.1	13	30.48
Developing Quality and Performance Management Systems	51.1	8.6	30.05
Making the Business Case for your Services	51.1	10.9	28.43

Listen, Learn and Disseminate



A Roadmap

No two
paths are
identical



DISABILITY NETWORK BUSINESS STRATEGIES: A Roadmap to Financial and Programmatic Sustainability for Community-Based Organizations



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■ 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



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Maryland



Missouri



New Hampshire



New York



Texas

Business Development Learning Collaborative



Illinois



Minnesota




Virginia

Stories from the Field Contest



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- 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.
Connect.
People.

Stories from the Field Winners



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- 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.

Webinars

- Business Acumen 101
- Business Acumen Toolkit
- Stories from the Field



<http://www.hcbsbusinessacumen.org/webinars.html>

Presentations



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■ 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!



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- 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](https://www.HCBSBusinessAcumen.org)
- Developed in collaboration with partners in Fall 2017
- Let's take a tour!



WHO WE ARE

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PROVIDING RESOURCES TO
SUSTAIN DISABILITY
ORGANIZATIONS

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

Homepage



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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](#)

Who We Are



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OUR PARTNERS

OUR PURPOSE

Our Partners.

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](#)

Resources: Environmental Scan



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ENVIRONMENTAL SCAN

LEARNING COLLABORATIVES

TOOLKIT

WEBINARS

HCBS CLEARINGHOUSE

Environmental Scan.

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.

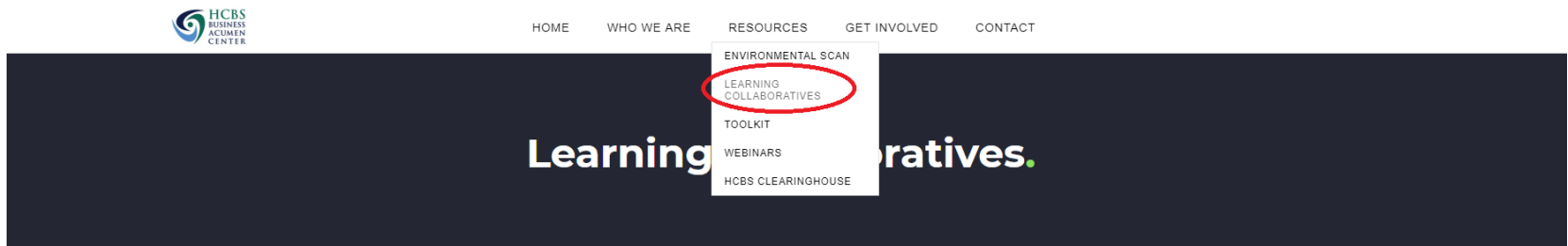
Responses were solicited from the following three categories, each with its own unique survey:

- 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



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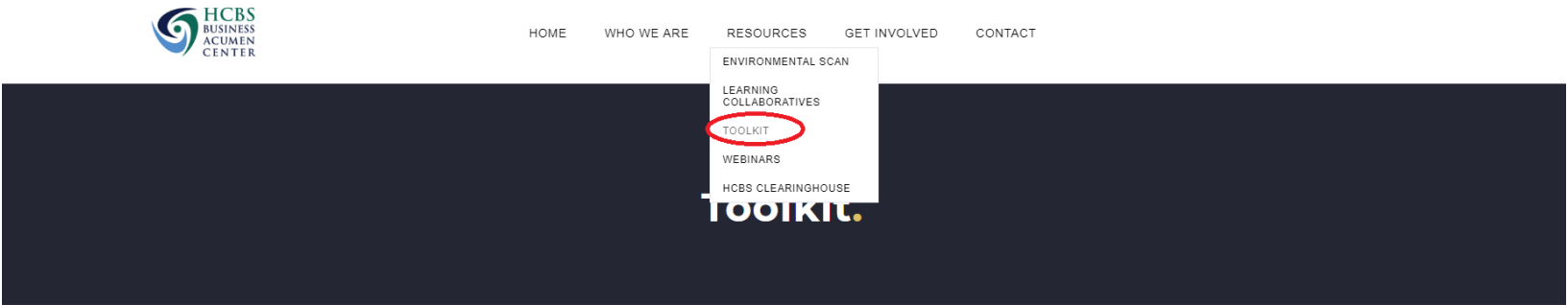


The HCBS Business Acumen Center's first Learning Collaborative brings together state teams comprised of state agencies, community-based organizations (CBOs) serving persons with disabilities, integrated healthcare entities and other organizations to work together to develop and implement business-related 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.

Resources: Toolkit



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

Resources: Webinars



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ENVIRONMENTAL SCAN

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WEBINAR ARCHIVE

Webinars.

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!



Resources: HCBS Clearinghouse



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- LEARNING COLLABORATIVES
- TOOLKIT
- WEBINARS
- HCBS CLEARINGHOUSE**

HCBS Clearinghouse.



[HCBS.org](https://www.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,*

Get Involved



Get Involved.

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 *

EMAIL *

PHONE NUMBER *



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WHO WE ARE

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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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Thank You!



www.hcbsbusinessacumen.org



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

E-mail: businessacumen@nasuad.org

Or Call: 202.898.2583