



Strategic Planning Session

Fiscal Year 2021



Our Mission

We use our passion for compassion to provide exceptional home health care enabling independent living and quality of life for our clients and their families.

Our Vision

Leading the way in community home health through innovation, compassion and integrity; creatively reinvesting in our community and promoting partnerships to achieve service excellence, financial stability and optimal community health.

Our Strategic Priorities





Strengths

- Caring staff
- Home care expertise
- Personalized care
- Community reputation
- Anticipating community need
- Living the mission
- Open to change
- Market share

Weakness

- Staff turnover
- Training time investment
- Too small to be big, too big to be small
- Lack of awareness of scope of services
- Recruitment/workforce issues
- Pay competitiveness
- Fundraising
- Continuing referrals

Opportunities

- New staff
- Aging community
- Sicker patients at home/clinical expertise
- Interaction & education with referral sources
- Better awareness of scopes of services
- Fundraising
- Better converting of referrals

Threats

- Patients being discharged sicker/more complex/acute
- Re-hospitalization rate
- Introduction of for-profit competitors
- Change in Medicare PDGM
- Changing culture/expectations of Baby Boomers
- Outside factors impacting ability to provide care



Strategic Imperative: Financial Viability

Goal: To ensure our long term financial viability by responsibly managing revenue and expenses in a changing healthcare environment.

Objective 1: Maximize reimbursement under PDGM pay resulting in meeting revenue targets for fiscal year

Tactics

- Develop new targets for post-COVID episodes
- Capture an accurate clinical assessment meeting targeted case mix weight
- Manage utilization of services in each 30 day period of care to minimize the number of LUPAs.
- Submit a RAP within 7 days 100% of the time (5-20 currently at 9 days)

Objective 2: Meet hospice revenue target of \$600,000 in fiscal year 2021. (or state as meet or exceed budget target)

Tactics

- transition patients from palliative care to hospice
- develop new messaging and marketing for palliative care based on new phased approach.
- develop outreach plan to providers and the public in a different way
- develop systematic palliative care referral processes - learn how we identify patients in home care or LTC programs and which are appropriate for palliative care; internal and external referral sources.

Objective 3: Monitor direct costs of long term care services given current COVID challenges and identify other opportunities such as capturing revenue from other payors.

Tactics

- Capturing services under a different payor (moving to skilled when appropriate)



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- Clarify what factors into LTC costs and provide more reporting (quarterly) so we can react to it in a more timely fashion.
- Measure how many LTC convert to palliative care, home care or hospice.
- Take systematic approach to documentation for LTC visits so staff to identify needs and opportunities to utilize other service.
- Look at payor mix for LTC and understand our current mix of CFI, Title XX and the VA.
- Create an efficient schedule that maximizes revenue and client satisfaction resulting in less cancellations and better utilization of staff time.
- Staff and community education promoting the value of LTC services. Emphasize value of their skills to the organization.
- Identify opportunities for grants that could support LTC program based on diagnosis or needs (ie cancer treatments; dementia).

Objective 4: Meet 2021 budget targets for fundraising, contributions and grants:

\$25,000 - contributions

\$40,000 - fundraising

\$10,000 - bequest and grants

Tactics

- Identify program metrics that will support grant writing efforts for the year.
- Reporting training for staff to access data that is already being captured.
- Define parameters for definition of a current donor and ensure the database only includes active records.
- Send out donation acknowledgements within 2 weeks of receipt of gift.
- Gather email addresses to allow for email fundraising.
- Identify specific "ask" around funding number of visits.
- Research online giving and text donation applications.
- Identify COVID related messaging and opportunities in fundraising.
- Create a new website to provide foundation for online donations and clear mission-based messaging to promote giving.



Strategic Imperative - Experience

Goal: Create an exceptional experience for clients, families, referrers and community at every touchpoint.

Objective 1:

Conduct routine training for staff resulting overall in home care satisfaction rating HHCAPS by 2% (compared to fy2020 results of 90% overall rating of agency).

Tactics

- Use huddles
- In-service training
- Develop scripting

- Identify key areas for improvement that would drive satisfaction ratings

Objective 2:

By end of October 2020, conduct survey regarding use of provider portal resulting in 75% usage by end of fiscal year.

Tactics

- Conduct survey regarding use of provider portal
- Develop script for survey
- Tabulate and publish survey results

- Increase use of portal

Objective 3:

Utilizing technology, identify means for educating and informing our community and capture participant satisfaction post-event.

Tactics

- Survey participants who take part in community presentations then use those results to rate satisfaction and develop content for subsequent events/outreach/presentations.



Strategic Imperative: Community

Goal: To be an integral partner providing coordinated care, and a trusted resource for our community.

Objective 1: Sustain and build community based palliative care program resulting in an average census of 80 by end of FY2021.

Tactics

- Capture and review quarterly reporting on palliative care referral source to identify new referrers as well as those who have dropped off.
- Conduct outreach based on reporting.
- Add palliative care referral source as part of our intake process
- Identify all forms that need to be completed and in place for palliative care (ACD, POLST, DNR)
- Articulate our vision for palliative care, ensuring internally we have a clear vision and a path for the next year.

Objective 2: Establish baseline to identify number of all patients discharged in FY2021 who have completed Advanced Care Directives.

Tactics

- establish how to pull reports on how many clients have ACD on file
- Utilize new technology to conduct ACD remotely



Strategic Imperative: Recruitment and Retention

Goal: Overcome barriers to recruiting and retaining employees to become the employer of choice for home care professionals.

Objective 1: To have no missed visits and no turn down no referrals due to staffing.

Tactics

- Highlight the benefits of home care through recruitment (consistent employment, benefits, treatment of staff during COVID)
- Create videos so applicants can get a realistic view; how is home care is different. Developing relationships, not the 9 to 5 grind. Talk about why it's right but be realistic about the challenges.
- Find opportunities for recruitment given current unemployment situation.

Objective 2: Reduce employee turnover to be less than 10%.

Tactics

- Conduct anonymous employee satisfaction survey and roll out
 - Hold Virtual Staff Town Hall with survey results
- Develop reporting on exit interviews so information can be acted upon to reduce turnover.
- Address environmental concerns - develop process for reporting and referring to Safety Committee for follow up.



Strategic Imperative: Quality of Care

Goal: Delivering a high quality of care that meets or exceeds standards.

Objective 1:

Develop plan of care resulting in maintaining improvement to star ratings and outcome measures.

Tactics

- Redefine process for preadmission calls
- As part of Quality API program, identify key areas for improvement
- Overcome staffing concerns that are impacted by COVID
- Develop quality outcome measures based on OASIS scores to maintain star rating.

Objective 2:

Reduce NTUC (not taken under care) to not exceed 10% of total referrals per month

Tactics

- Institute regular reporting on NTUC's to review trends
- Develop strategies for overcoming trends identified.