



Respite Agency Best Business Practices

"Instrumental to your Success, In Harmony with Your Clients"

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UCP of Sacramento & Northern CA

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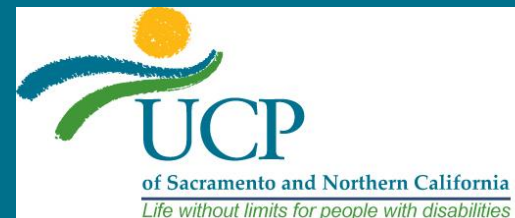


Introduction

UCP of Sacramento & Northern California

- **Incorporated in 1955** in Sacramento
- **4,200 people** a month served in **8 counties**
- **Empowering children and adults** who without support would be isolated from their community
- **MOTTO: “Life without limits for people with disabilities”**

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Introduction



UCP of Sacramento & Northern California

SERVICES

- **After-school program** for children with autism
- **Therapeutic horsemanship** activities
- **Adult day** programs
- **Independent living** services
- **In-home respite care** for families
- **Specialized transportation** and **recreational programs**

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Purpose and Goals

- **PRESENTATION OVERVIEW**

- **UCP's Journey** - the story of our Respite program
- **Business Practices** that most influenced of program
- **Role of Technology** in helping UCP meet its goals

- **PRESENTATION GOALS**

- Convey best practices used in **creating quality services** for clients
- Inspire **ENTHUSIASM about technology** (our mission to MARS!)

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A Look Back at the Journey

1979: Respite becomes a reality for UCP!

A time when...

- A **Cloud** was just a cloud, and twitter and tweets were sounds that birds made
- No one had ever heard of **Facebook, Google or Yahoo**
- **Phones** had **cords** and were used to actually **TALK** with one another
- Computers used **floppy disks** and no one had ever heard of **e-mail** or **texting**
- “**The Web**” was reserved for spiders & an “**Apple**” was something you ate
- Words like “**selfie**”, “**blog**” or “**#hashtag**” were not found in the dictionary
- **PAPER** was an integral part of any successful business



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Community Need/Opportunity

Late '70s - UCP recognized a growing community need

- **Quality, in-home respite care program** - for children and adults who had a developmental disability
- **UCP developed Family Respite Services** – provides trained paraprofessionals to come into the family's home care for the child or adult on **intermittent or regularly scheduled temporary basis**, relieving caregiver of constant care responsibilities
- Before advent of technology, we didn't recognize that we were actually using some **very important business practices** in our organization that we still use today
- Back then, we were more akin to that **1988 Nike tag line – Just Do It!**
- After all that was how we had always operated, so **why change?**

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Best Practices

In reflecting back over our journey, we can identify **best practices** that have influenced our agency:

- ✓ **Vision**
- ✓ **Mission**
- ✓ **Strategic Planning**
- ✓ **Strategic Management**
- ✓ **Customer Advocacy**
- ✓ **Technology**

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Vision and Mission

Vision Statement

- ✓ Communicates a **sense of purpose**
- ✓ Expresses what is **important** and why
- ✓ Focuses on the **future**
- ✓ Reflects on the **shared values** of the stakeholders

Mission Statement – How will you reach your vision?

- ✓ Sets the agency's **direction**
- ✓ **Clear** and concise
- ✓ **Realistic**
- ✓ Reflects organizational **values**
- ✓ Demonstrates **commitment** to serving others;
- ✓ **Action-oriented**

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Vision and Mission Statement

UCP of Sacramento & Northern CA Mission and Vision Statement

Vision

UCP of Sacramento and Northern California is steadfastly dedicated to empower people with developmental disabilities to live life without limits, to consistently expand our delivery of valued services to a growing and diverse community, and to excel at anticipating and meeting our clients' ever changing needs.



Mission

The mission of UCP Sacramento and Northern California is to provide programs and services that improve the independence, productivity, and quality of life of people with developmental disabilities and their families.

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Strategic Planning

ONE DEFINITION

“A road map that outlines the long-term goals of an organization or program and details how these will be achieved by adopting specific strategies, approaches and methodologies.”



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Strategic Planning

Why Develop a Strategic Plan?

- Clearly defines the **purpose of the organization** and establishes **realistic goals and objectives** consistent with that mission in a **defined time frame** within the **organization's capacity** for implementation
- Develops a **sense of ownership** of the plan
- Provides a base from which **progress can be measured** and establish a mechanism for **informed change** when needed
- Provides a **clearer focus** for the organization, thereby producing more **efficiency** and **effectiveness**

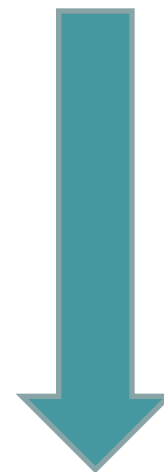
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Strategic Planning Content



Start with the “big picture”



Drill down to specifics

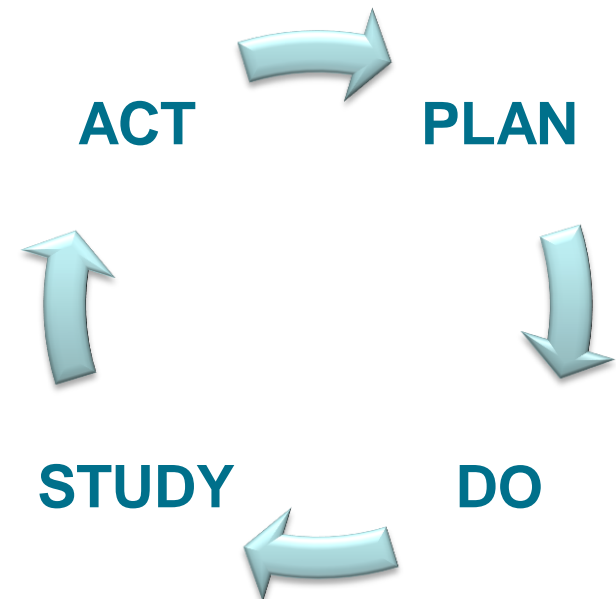
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of Sacramento and Northern California
Life without limits for people with disabilities

Why Become Metric Based?

- We can't **manage** what we can't **measure**
- Metrics developed based on the priorities of the **strategic plan**
- Decision makers **examine outcomes** to **guide the company** and **provide feedback**
- Metrics **guide improvement** on a **continuous basis**
- Permits managers to **see the company more clearly** and **make wiser long-term decisions**
- **Removes emotions** from the decision process



Enables UCP to keep its promise to our clients, their families and to our core values!

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Strategic Planning Comparison

Strategic Planning	Previous Types of Planning Used by UCP in our early years
Top-down	Bottom-up/Staff generated
Creates future	Extends the present
5 to 20-year horizon	1- to 5- yr. horizon
Guides management behavior	Little or no guidance from management behavior
External customer focus outcomes	Internal customer focus outcomes
Effectiveness	Efficiency
Emphasized the process	Emphasized the plan
Proactive	Reactive

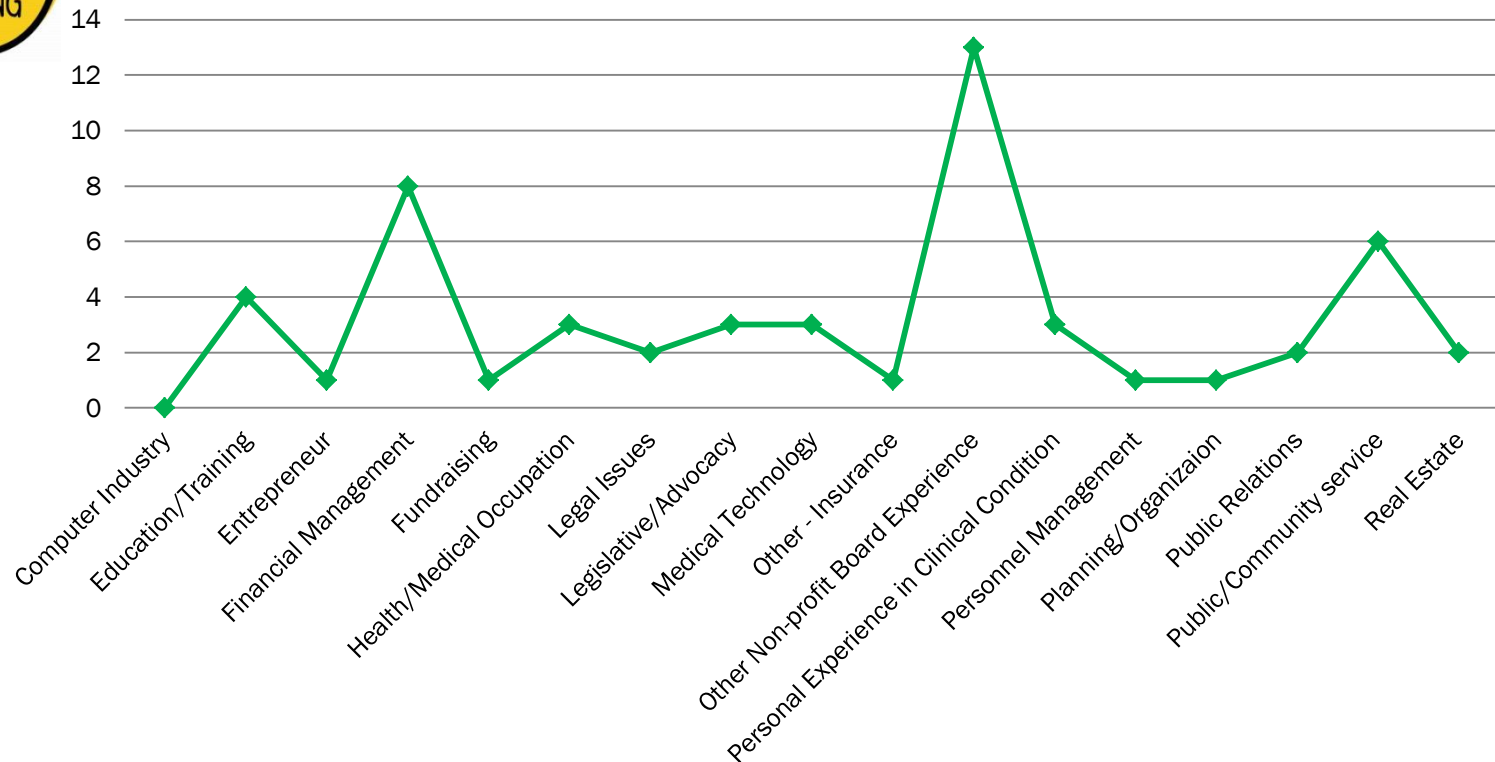
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Strategic Planning



Board of Directors Areas of Expertise



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Client Success Strategy

Achieve High Customer Satisfaction

Developing “Sweet Harmony” between Customer & Vendor!



Help families feel comfortable and build trust. Spend enough time with the family to develop a comfort level that will allow a free flow of information



Provide a flexible structure by providing as many options as possible to meet the needs of the family, rather than fitting the family into the service available



Be family-focused. Understand parents deciding to leave their child, who has special needs, in the care of someone else may experience a variety of hesitations and may need assistance overcoming their fears



Provide support by being able to field questions/concerns of parents that may be outside the realm of respite care. Be available to provide referrals to other agencies



Provide quality staff that are professionally managed and trained

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Management Strategy

“TIP THE SCALES!”

For a more **balanced approach** in operating your business

- **Balanced Scorecard**
 - Between **Heart** and **Revenue**
- **Plan – Do – Study – Act**
 - A continuous improvement model
- **S.W.O.T. Analysis**
 - Strength, Weaknesses, Opportunities & Threats



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Nashville Trivia

1. What **country music star** was know as the **Father of Bluegrass Music**?
2. What **country music entertainers** went into the **Sausage business**?
3. Name the **Nashville museum** that **houses Elvis'** gold cadillac and piano.
4. Although this **now famous coffee** is still enjoyed everywhere, it was served for the last time at the hotel where it got its start on December 25, 1961. What was the **name of the Nashville hotel**?
5. Who is the **only country recording artist** to be **elected twice** to the **Country Music Hall of Fame**?



Nashville Trivia

6. After drinking a cup of locally produced coffee in Nashville, which **U.S. president** coined the phrase "**good to the last drop!**"?
7. What **famous Nashville candy** is made of chocolate, caramel, marshmallows and peanuts?
8. Who is **Mr. Guitar**?
9. Who became famous as the **featured female singer** on **Porter Wagoner's Show** and now has her own theme park in the Smokey Mountains?
10. What singer used to **wash dishes at the Nashville Palace** and is now credited as beginning the movement of New Traditionalists?



Our Future in Respite

- Remaining steadfast in our **Vision**
- Continuing to fulfill our Agency's **Mission**
- Using **Strategic Planning**, we are poised to mitigate obstacles, like:
 - Overtime expenses
 - Changes in funding relationships
 - Legislative changes
- Taking on **new opportunities** when they arise, like:
 - Expanding into other service areas
 - Increasing our client base
 - Elder care services
- **Embracing Technology to execute our mission!**



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Respite & Technology

How Technology transformed our respite program!

1. We converted from a **paper-based** to a computer-based system
2. We had the **data we needed in electronic format**
3. **BUT...**We were still missing a **critical piece** of the puzzle
4. We needed to **connect the data-in real time-within one complete system**
5. **MARS** Software was born!
6. A Web-based, **integrated data solution** that completes the data puzzle



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Remote Personnel Web Solutions, Inc.



SAY “GOODBYE” TO PAPER-BASED SYSTEMS!



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THE PROBLEM: Tracking Respite Operations

- Monitoring & Minimizing **OVERTIME** Costs
- Avoiding Exceeding Authorized Hours (**BAD DEBT**)
- Fully Utilizing Authorized Hours (**SERVICE/REVENUE/WORK**)
- Effectively Managing **BILLING & HR** Functions
- Costs, Risks & Limitations of **PAPER-BASED SYSTEMS**
- Tracking Worker **MILEAGE**
- **ACCESS TO INFORMATION** (Administration, Caregivers & Clients)

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THE SOLUTION: MARS Software System

Web-Based Portal for Respite Care Operations Management

- ▶ **Caregiver & Client Profile System** - with Matching Feature
- ▶ **Web Portals**
 - ▶ **CAREGIVER** – manage schedules, mileage & communications
 - ▶ **CLIENT** – review authorizations and preferences
- ▶ **Integrated Timekeeping & Scheduling System**
- ▶ **Accounting & Billing System**
- ▶ **Applicant Tracking System**
- ▶ **Reports**

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BENEFITS: MARS Software System

MORE REVENUE & LESS EXPENSE = HIGHER EARNINGS

- Maximize **utilization** of authorized hours
- Reduce **bad debt** (unauthorized hours worked)
- Minimize **overtime** expenses
- Streamline **billing, accounting & HR** processes
- Realize savings and efficiency of **non-paper based** system
- Enjoy benefits of anywhere, anytime **Web-based access**

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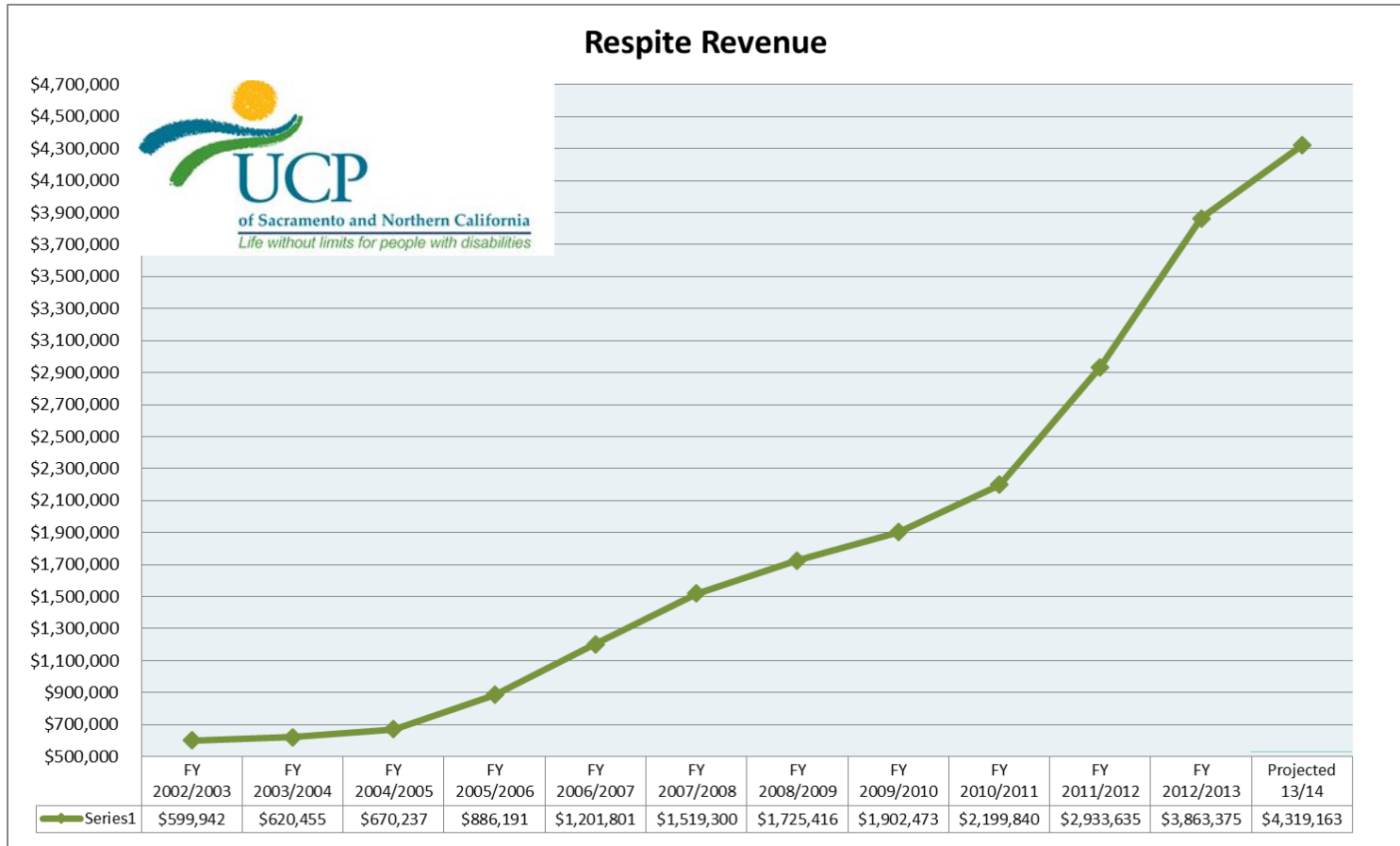


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MARS Drives 150% Revenue Increase!

(\$2.6M increase from 2008-2014)



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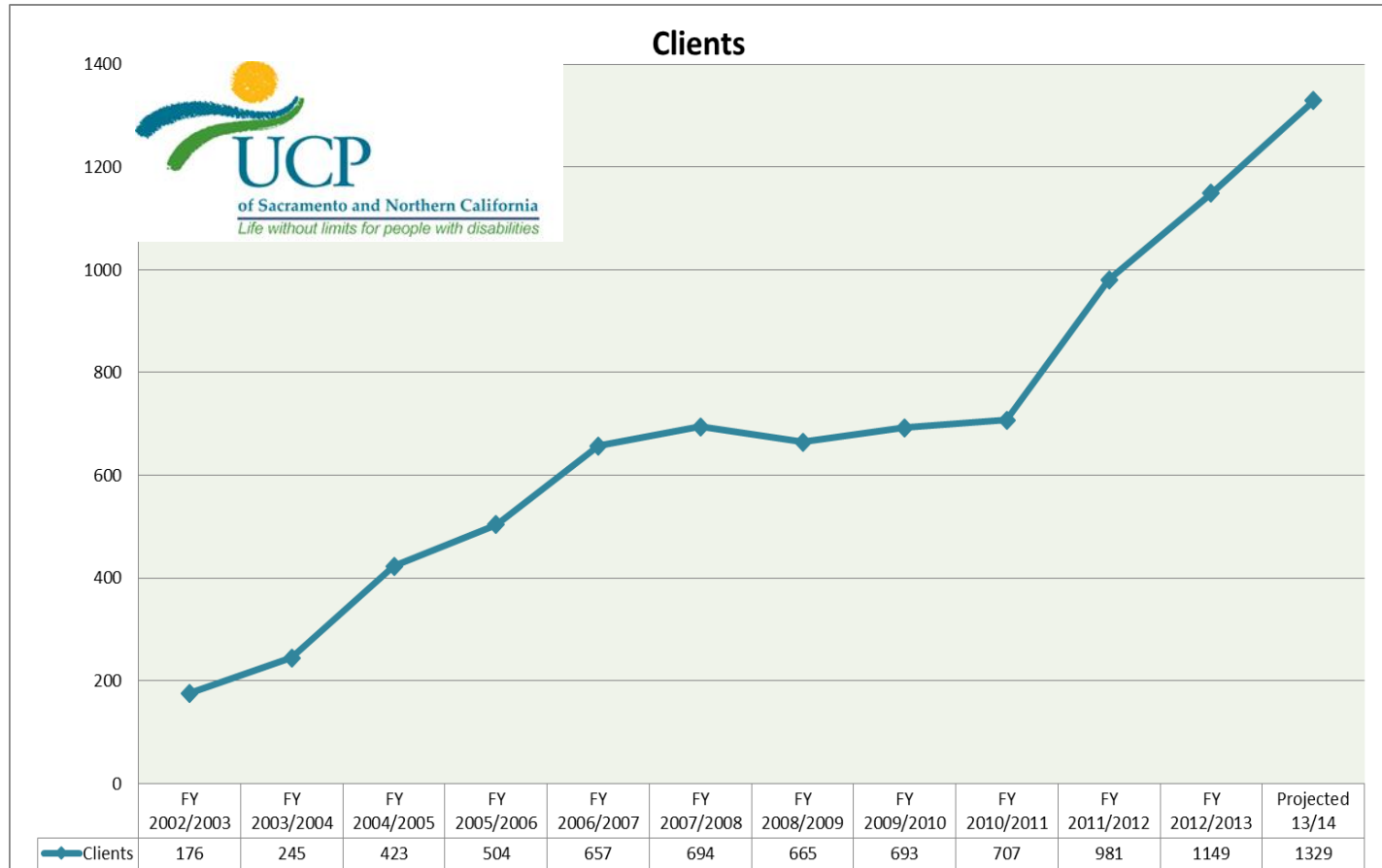


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MARS Drives 100% Increase in Clients!

665 to 1,329 (99.85% Increase from 2008-2014)



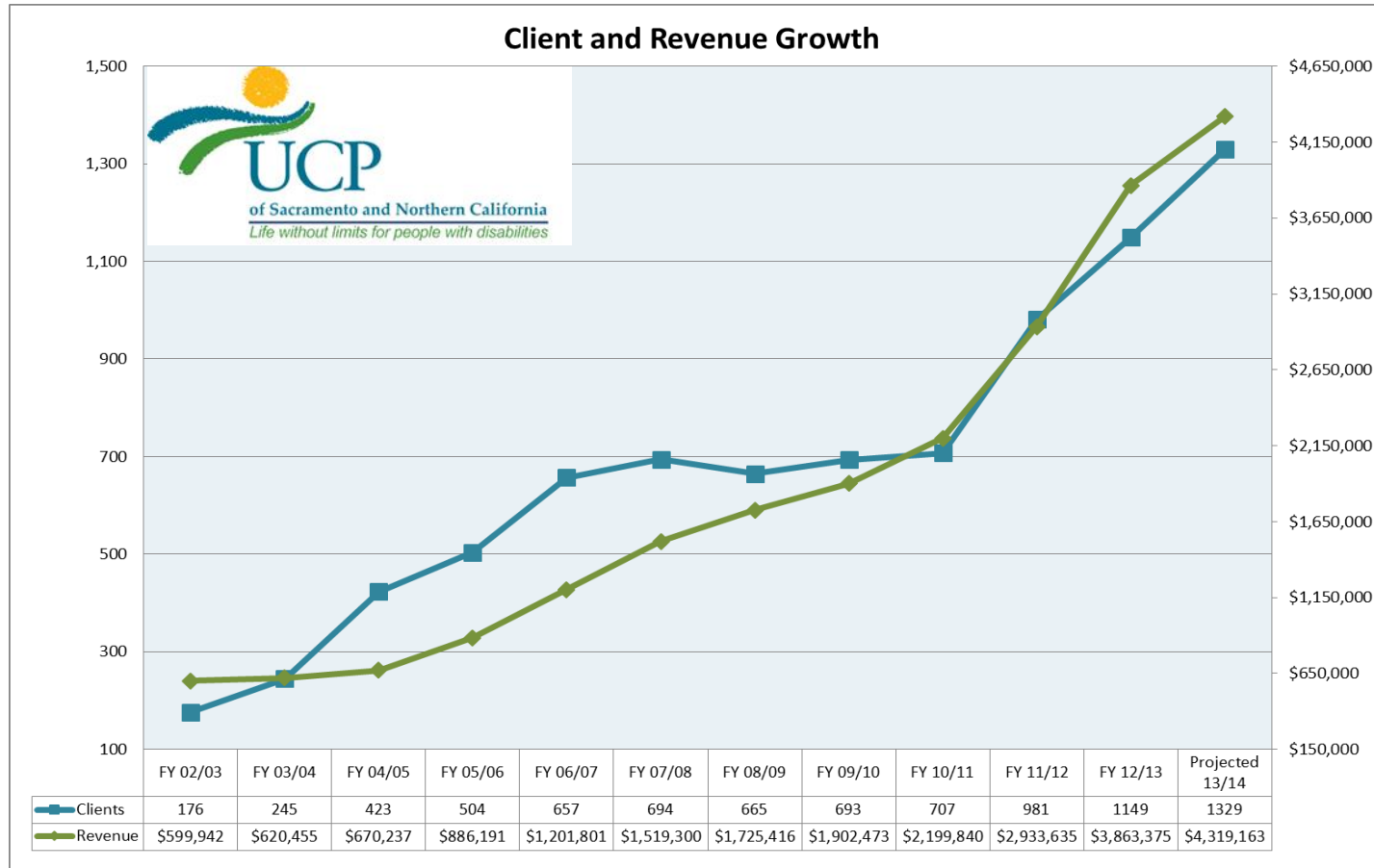
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MARS Gets Results for Respite Providers!



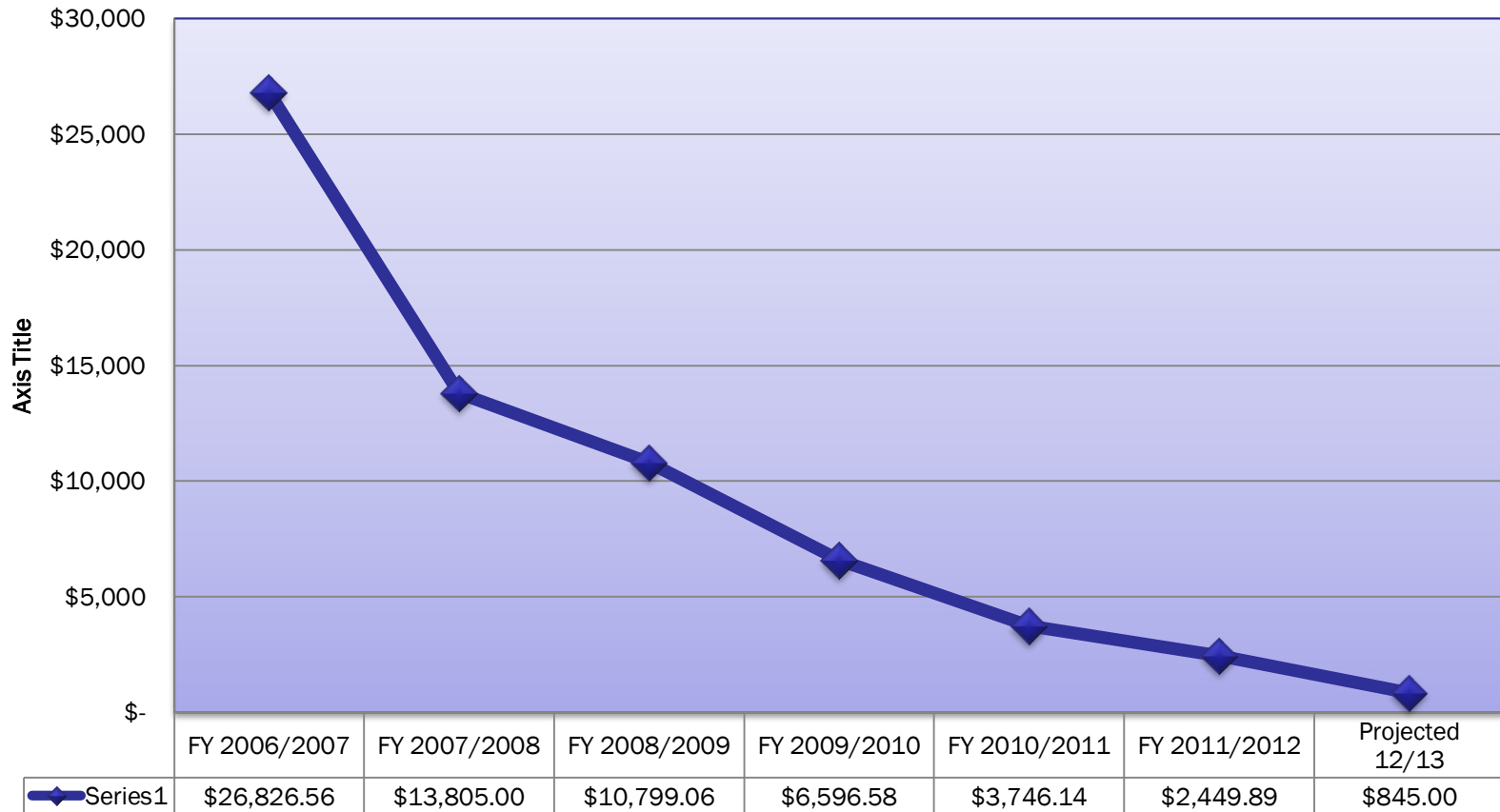
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MARS Reduces BAD DEBT!



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OVERTIME TRACKING: Instantly w/MARS!

- ▶ New Law Effective January 1, 2015
- ▶ Requirements & Mandates
- ▶ UCP Sacramento Just Ran Internal Overtime Reports
 - ▶ Currently serving about 1,300 clients
 - ▶ Saved \$150k in Annual Overtime due to MARS
 - ▶ **Using these metrics = Over \$100 savings/client/year**
 - ▶ **MARS has paid for itself from this benefit alone!**

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OVERTIME TRACKING: UCP Results

Snapshot ID: 270
Snapshot Period: Sat 3/1/14 12:00 AM -
Mon 6/30/14 11:59 PM

Status: Ready for Payroll

Employee Count: 476
Timecard Count: 17336

Pay Type Total: 61948.4 (61948h 24m)
x1.5 Total: 4436.62 (4436h 37m)
x2 Total: 2997.85 (2997h 51m)
Total Time: 69382.87 (69382h 52m)

Date Created: Wed 7/9/14 11:58 AM
User Created: dainnam

	Rate	Hours	OT/DT	Total
Overtime	9.80	4436.62	0.5	21,739.44
Double-Time	9.80	2997.85	1	29,378.93
Total OT and DT for 4 months				51,118.37
Estimated 12 Month OT/DT cost				153,355.10

**Actual 4 Months results annualized
to \$153,000 in SAVINGS!**
This UCP agency serves
over 1,300 clients

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Life without limits for people with disabilities

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Remote Personnel Web Solutions, Inc.