

# Respite Agency Best Business Practices

---

## ” Reaching New Altitudes in Respite Care”

How to Create a  
Sustainable Respite Business

Interactive Group Discussion

**Tanya Vallad, Training Instructor**  
**Jodi Guevara, Director of Sales & Marketing**  
UCP of Sacramento & Northern CA



Communicate ♦ Serve ♦ Grow ♦ Sustain





# Purpose and Objective

---

- **Why are we here today?**
  - *Provide a comprehensive review of best business practices for a successful respite agency*
  - *Steps necessary to elevate respite care to higher altitudes*
  - *Role of technology*
  
- **What are our goals for today's presentation?**
  - *Communicate the pivotal approach in building a sustainable respite business*
  - *Key elements for success*
  - *Explain the importance of technology*
  
- **What do we want you to leave with at the end of the day?**
  - *A greater understanding of best business practice strategies*
  - *Acknowledge how much of the success weighs heavily on strategic planning in regards to long term revenues*
  - *Recognize the fundamental value of technology*

Communicate ♦ Serve ♦ Grow ♦ Sustain



# Introduction



## UCP of Sacramento & Northern California

- Incorporated in **1955** in Sacramento, CA
- **5,300 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”**

Communicate ♦ Serve ♦ Grow ♦ Sustain





# 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**

Communicate ♦ Serve ♦ Grow ♦ Sustain





# Overview

---

- TOPICS

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

- OBJECTIVES:

- Inspire **ENTHUSIASM** about technology (RespiTrack)
- Convey best practices used in **creating quality services** for clients

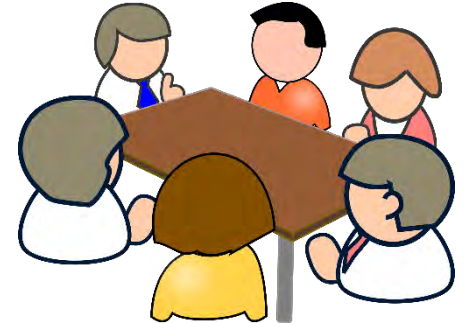
Communicate ♦ Serve ♦ Grow ♦ Sustain



# Let's Hear From You

## Group Discussion

(15 minutes)



- Break into small groups (5-10 people)
- Discuss and note 3-4 of **your** best practices
  - *What's working*
  - *What's not working*
  - *What do you want to change but not sure how*
- Come back together to share best practices by group

Communicate ♦ Serve ♦ Grow ♦ Sustain



# A Look Back at our Journey

---

1979: Respite becomes a reality for UCP!

A time when...

- A **Cloud** was just a cloud
- **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-mailing** 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



Communicate ♦ Serve ♦ Grow ♦ Sustain



# Community Need & Opportunity

---

## 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 to care for a 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?**

Communicate ♦ Serve ♦ Grow ♦ Sustain







# 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

Communicate ♦ Serve ♦ Grow ♦ Sustain



# 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**

Communicate ♦ Serve ♦ Grow ♦ Sustain



# 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.

Communicate ♦ Serve ♦ Grow ♦ Sustain





# 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.”



Communicate ♦ Serve ♦ Grow ♦ Sustain



# 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**

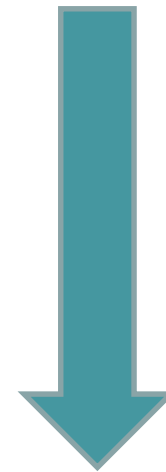
Communicate ♦ Serve ♦ Grow ♦ Sustain



# Strategic Planning Content



Start with the “big picture”



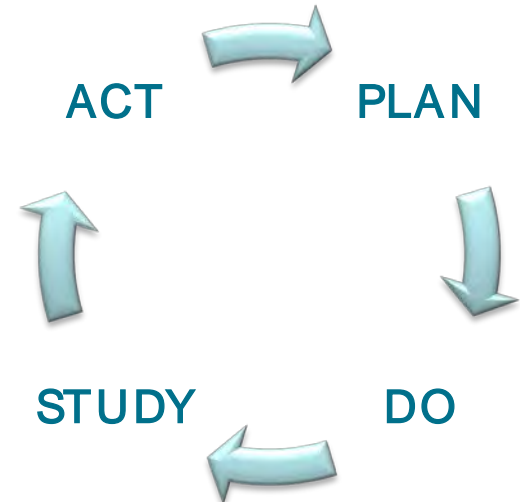
Drill down to specifics

Communicate ♦ Serve ♦ Grow ♦ Sustain



# 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!

Communicate ♦ Serve ♦ Grow ♦ Sustain



# 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
3 to 5 year horizon	1 to 2 year 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

Communicate ♦ Serve ♦ Grow ♦ Sustain

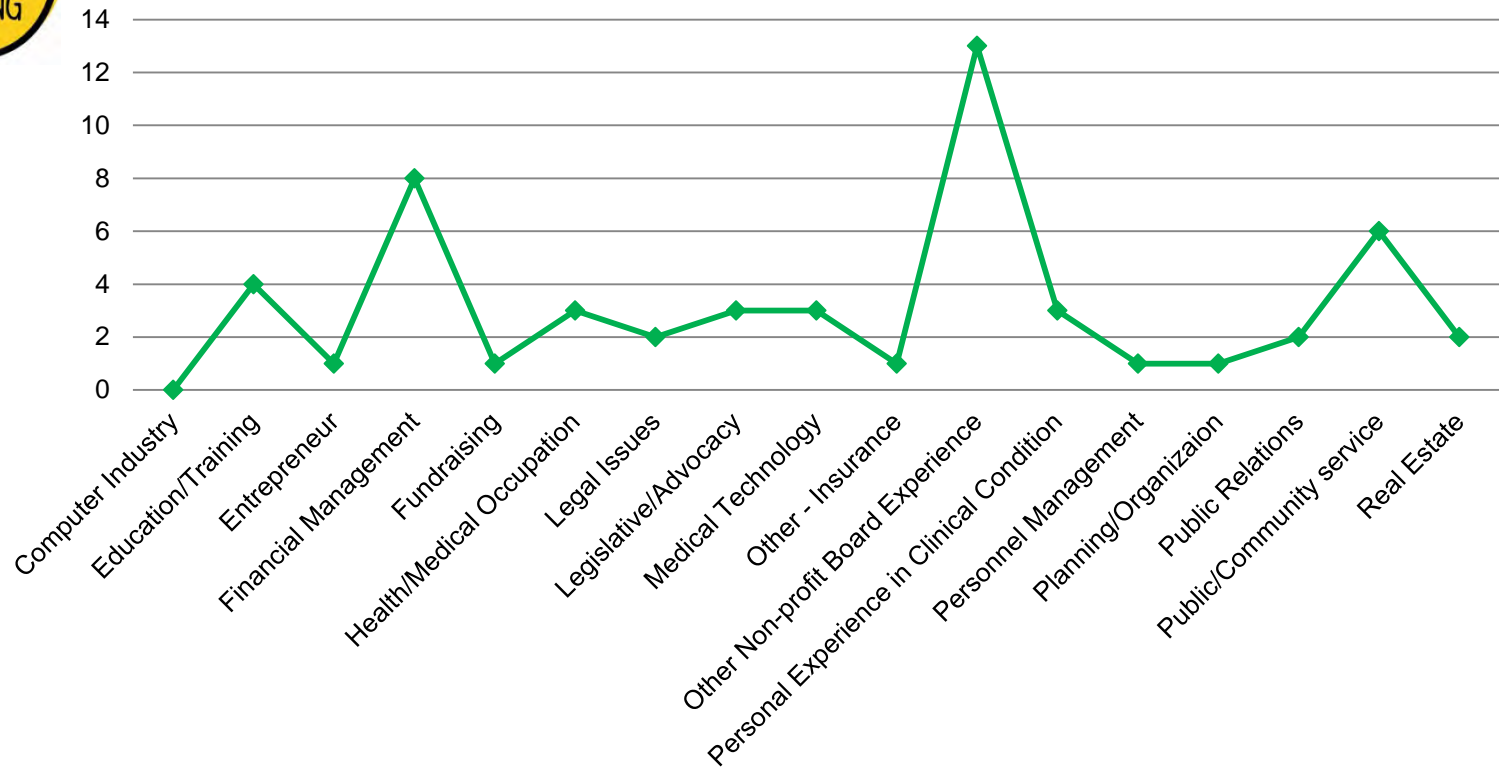




# Strategic Planning



## Board of Directors Areas of Expertise



Communicate ♦ Serve ♦ Grow ♦ Sustain



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



# Client Success Strategy

## Achieving Mile High Customer Satisfaction

### Elevating Customer & Vendor Relationships!



**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

Communicate ♦ Serve ♦ Grow ♦ Sustain



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



# Management Strategy

## Steady as you go

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

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



Communicate ♦ Serve ♦ Grow ♦ Sustain



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



# Colorado Trivia

---

1. What is Denver's nickname?
2. In an average year, how many **days of sunshine** fill the sky in Denver?
3. How many **visitors** come to **Rocky Mountain National Park** every year?
4. What infamous Denver street is known as the “**Longest, Wickedest Street in America?**”
5. What year did the **Denver Broncos** win their last **Super Bowl?**





# Colorado Trivia

---

6. Denver, lays claim to the invention of what?
7. What **reptile** is featured in the **Denver Zoo** that is the **worlds largest exhibit of its kind**?
8. Which **Broncos player** was nicknamed “**Snow Goose**” ?
9. In what **year** was **Rocky Mountain National Park** created?
10. In what **year** did the **Broncos** win their **first Super Bowl**?





# Our Future in Respite

- Maintaining a stronghold on our **Vision**
- Continuing to fulfill our Agency's **Mission**
- Using **Strategic Planning**, we are prepared 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 complete our mission!**



Communicate ♦ Serve ♦ Grow ♦ Sustain



# Respite & Technology



How Technology took our respite program  
to Mile High Status!

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. **RespiTrack** Software was born!
6. A Web-based, **integrated data solution** that completes the data puzzle



Communicate ♦ Serve ♦ Grow ♦ Sustain



# Just about Done!

---

Stay with me....



Communicate ♦ Serve ♦ Grow ♦ Sustain





# Drinkie, Drinkie Time!

---

Or maybe.....



Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions

Remote Personnel Web Solutions, Inc.



# SAY "GOODBYE" TO PAPER-BASED SYSTEMS!



Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions



# THE PROBLEM: Tracking Respite Operations

---

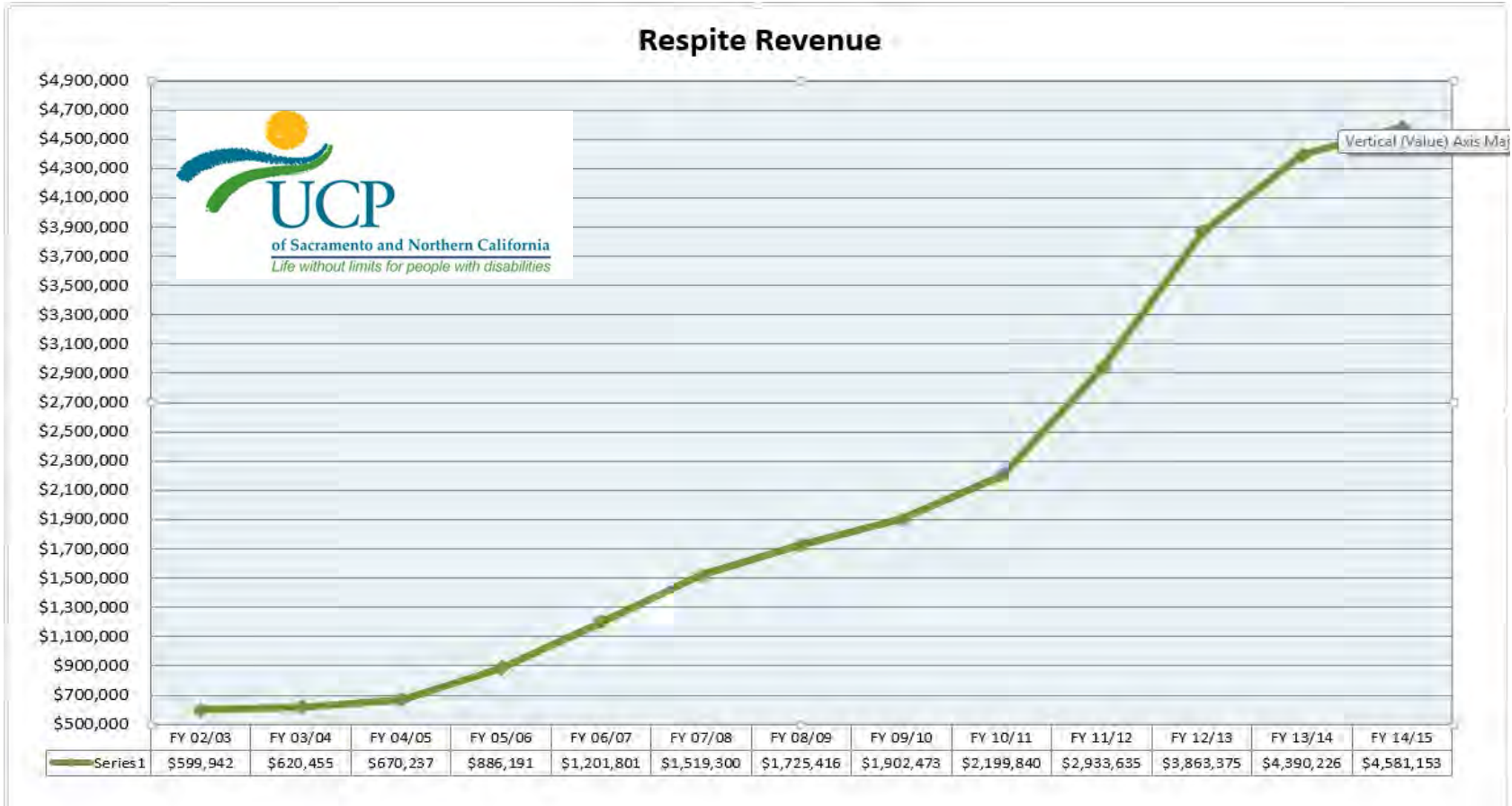
- ▶ Monitoring & Minimizing **OVERTIME** Costs
- ▶ Avoiding Exceeding Authorized Hours (**BAD DEBT**)
- ▶ Fully Utilizing Authorized Hours ( **SERVICE/REVENUE WORK**)
- ▶ Effectively Managing **BILLING & HR** Functions
- ▶ Costs, Risks & Limitations of **PAPER-BASED SYSTEMS**
- ▶ Tracking Worker **MILEAGE**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





# RespiTrack Drives 150% Revenue Increase!

(\$2.6M increase from 2010-2015)



Communicate ♦ Serve ♦ Grow ♦ Sustain

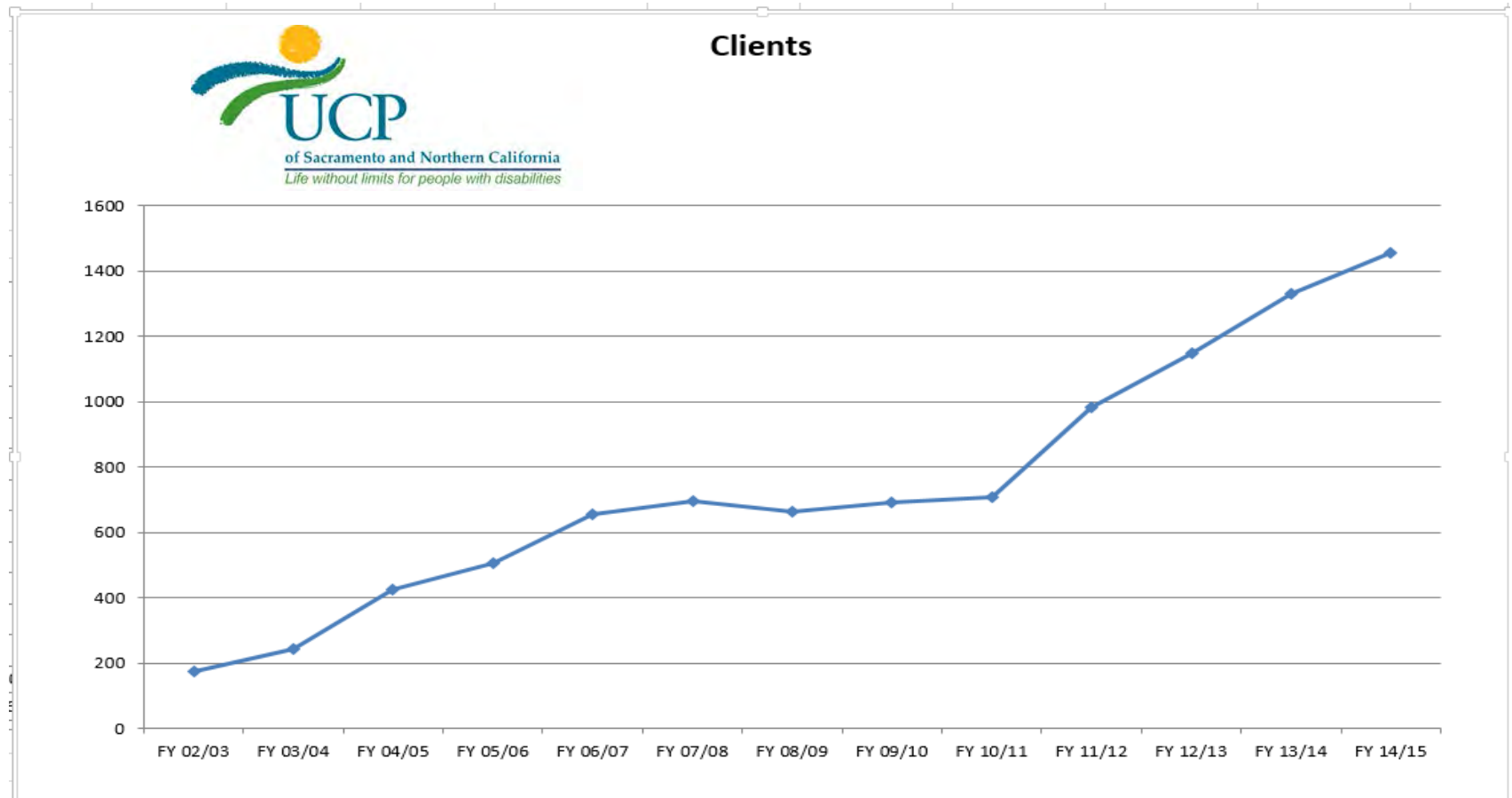


Mission | Resource | Solutions



# RespiTrack Drives over 100% Increase in Clients!

665 to 1,454 (118.65% Increase from 2008-2015)



Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions



# RespiTrack Gets Results for Respite Providers!

### Client and Revenue Growth

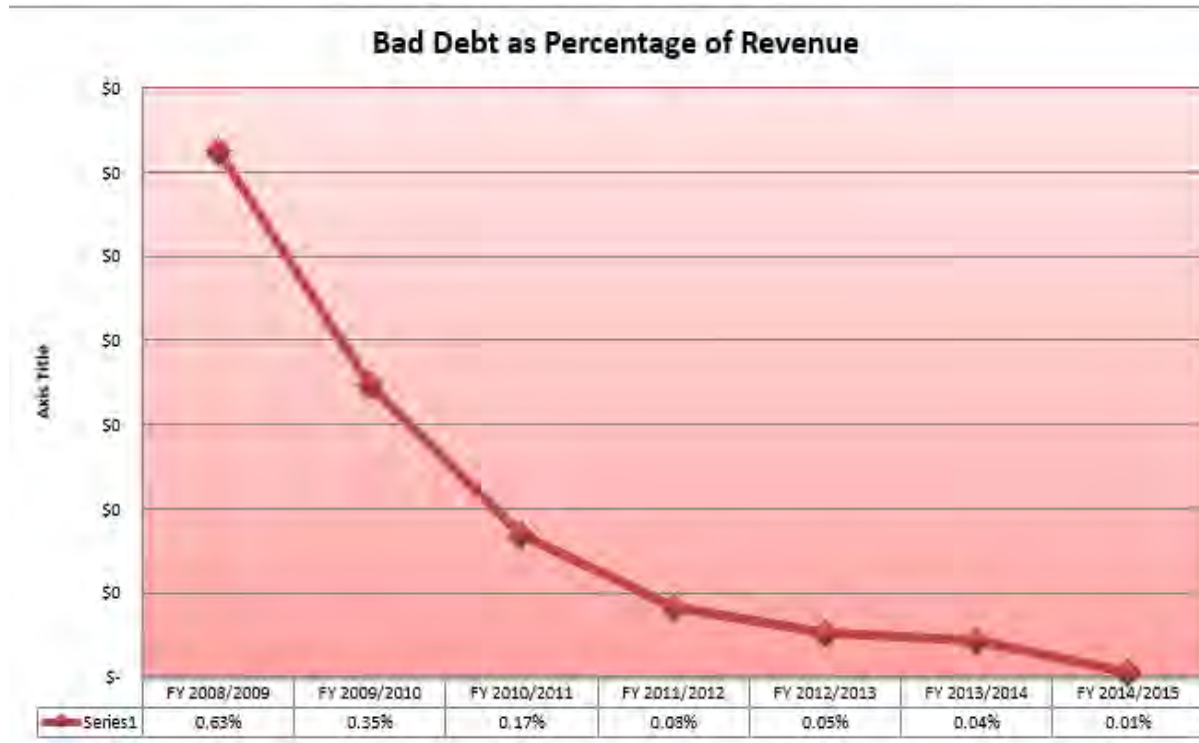


Communicate ♦ Serve ♦ Grow ♦ Sustain





# RespiTrack Reduces BAD DEBT or UNUSED HOURS/DOLLARS



Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions





# THE SOLUTION: **RespiTrack** 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**

Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions



# BENEFITS: RespiTrack Software System

MORE REVENUE & LESS EXPENSE = HIGHER EARNINGS

---

- Maximize **utilization** of authorized hours/dollars
- Reduce **bad debt** (unauthorized hours/dollars 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**

Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions



# Virtual Timecard

---

## Reaching the Payroll Summit

- **Clock In/Out** - Workers can clock in or out from any internet-enabled device including smart phones or administration can complete payroll task
- **Flexibility in Submitting Payroll** – Allows workers to enter hours after respite appointment is completed
- **Integrates with your Payroll System** – Simplify your payroll by exporting directly to popular payroll providers

Communicate ♦ Serve ♦ Grow ♦ Sustain



Mission | Resource | Solutions



# OVERTIME TRACKING: Instantly with RespiTrack!

---

- ▶ New Law Effective January 1, 2015
- ▶ Requirements & Mandates
- ▶ UCP Sacramento Internal Overtime Reports
  - ▶ Currently serving about 1,500 clients
  - ▶ Saved \$150k in Annual Overtime due to RespiTrack
  - ▶ Using these metrics = Over \$100 savings/client/year
  - ▶ RespiTrack has paid for itself from this one benefit alone!





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

---

## Contact Information:

**Tanya Vallad**

Training Instructor

[tvallad@ucpsacto.org](mailto:tvallad@ucpsacto.org)

(916) 779-6262

**Jodi Guevara**

Director, Sales & Marketing

[jguevara@Missionrsi.com](mailto:jguevara@Missionrsi.com)

(855) 915-2525