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
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
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”
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**
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
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
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
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?**
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
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

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.
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.”
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**.
Strategic Planning Content

Vision-Mission-Guiding Principles

Initiatives

Goals
Projects
Metrics

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!
# Strategic Planning Comparison

<table>
<thead>
<tr>
<th>Strategic Planning</th>
<th>Previous Types of Planning Used by UCP in our early years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top-down</td>
<td>Bottom-up/Staff generated</td>
</tr>
<tr>
<td>Creates future</td>
<td>Extends the present</td>
</tr>
<tr>
<td>3 to 5 year horizon</td>
<td>1 to 2 year horizon</td>
</tr>
<tr>
<td>Guides management behavior</td>
<td>Little or no guidance from management behavior</td>
</tr>
<tr>
<td>External customer focus outcomes</td>
<td>Internal customer focus outcomes</td>
</tr>
<tr>
<td>Effectiveness</td>
<td>Efficiency</td>
</tr>
<tr>
<td>Emphasized the process</td>
<td>Emphasized the plan</td>
</tr>
<tr>
<td>Proactive</td>
<td>Reactive</td>
</tr>
</tbody>
</table>
Strategic Planning

Board of Directors
Areas of Expertise

Communicate  •  Serve  •  Grow  •  Sustain
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.
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
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, Wickest Street in America**”?

5. What year did the **Denver Broncos win** their last **Super Bowl**?
6. Denver, lays claim to the invention of what?

7. What reptile is featured in the Denver Zoo that is the world's 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
Just about Done!

Stay with me....

Almost Cheeseburger Time!
Drinkie, Drinkie Time!

Or maybe……..

Cocktails
SAY “GOODBYE” TO PAPER-BASED SYSTEMS!
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)
RespiTrack Drives over 100% Increase in Clients!
665 to 1,454 (118.65% Increase from 2008-2015)
RespiTrack Gets Results for Respite Providers!

Client and Revenue Growth

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Clients</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 02/03</td>
<td>176</td>
<td>$600K</td>
</tr>
<tr>
<td>FY 03/04</td>
<td>245</td>
<td>$620K</td>
</tr>
<tr>
<td>FY 04/05</td>
<td>423</td>
<td>$670K</td>
</tr>
<tr>
<td>FY 05/06</td>
<td>504</td>
<td>$886K</td>
</tr>
<tr>
<td>FY 06/07</td>
<td>657</td>
<td>$1202K</td>
</tr>
<tr>
<td>FY 07/08</td>
<td>694</td>
<td>$1519K</td>
</tr>
<tr>
<td>FY 08/09</td>
<td>665</td>
<td>$1725K</td>
</tr>
<tr>
<td>FY 09/10</td>
<td>693</td>
<td>$1902K</td>
</tr>
<tr>
<td>FY 10/11</td>
<td>707</td>
<td>$2200K</td>
</tr>
<tr>
<td>FY 11/12</td>
<td>981</td>
<td>$2934K</td>
</tr>
<tr>
<td>FY 12/13</td>
<td>1149</td>
<td>$3863K</td>
</tr>
<tr>
<td>FY 13/14</td>
<td>1329</td>
<td>$4390K</td>
</tr>
<tr>
<td>FY 14/15</td>
<td>1454</td>
<td>$4581K</td>
</tr>
</tbody>
</table>
RespiTrack Reduces BAD DEBT or UNUSED HOURS/DOLLARS!

Bad Debt as Percentage of Revenue

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Bad Debt Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2008/2009</td>
<td>0.63%</td>
</tr>
<tr>
<td>FY 2009/2010</td>
<td>0.35%</td>
</tr>
<tr>
<td>FY 2010/2011</td>
<td>0.17%</td>
</tr>
<tr>
<td>FY 2011/2012</td>
<td>0.08%</td>
</tr>
<tr>
<td>FY 2012/2013</td>
<td>0.05%</td>
</tr>
<tr>
<td>FY 2013/2014</td>
<td>0.04%</td>
</tr>
<tr>
<td>FY 2014/2015</td>
<td>0.01%</td>
</tr>
</tbody>
</table>

Communicate ◆ Serve ◆ Grow ◆ Sustain
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
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
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
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!
Contact Information:

Tanya Vallad  Training Instructor  tvallad@ucpsacto.org  (916) 779-6262

Jodi Guevara  Director, Sales & Marketing  jguevara@Missionrsi.com  (855) 915-2525