

PACE CONSORTIUM™

**REFLECT
AND RESET**

QUESTIONS ALL PACE
LEADERS NEED TO ASK

**TEMPLATES
CHECKLISTS**

**BOOKS THAT
CULTIVATE
GRATITUDE**

**NOVEMBER
2023**

**CONNECTING
VOICES**

**TURN GOOD
LEADERS INTO
GREAT LEADERS**

**STRONG
CULTURES**

**FOSTERING FUTURE
SUCCESS**

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Empowering PACE Teams to Thrive
Mark Buchl

EDITOR'S NOTE

Dear Readers,

As we gracefully descend into autumn, a season that wraps our world in warm hues and promises change, our spirits are invited into a contemplative realm. It is a moment to pause, to inhale the crisp air, and to pay tribute to the people who have etched their presence upon our journey.

As the leaves gently descend, nature imparts profound wisdom—a tender reminder of the exquisite beauty in letting go to create space for renewal. These lessons, we believe, resonate not only in the rustle of falling leaves but also in the evolution of our PACE programs.

In exploring this edition, we'd like to invite you to deliberate on the framework of your PACE program. This season provides a fortuitous juncture to liberate ourselves from strategies that may no longer serve our purpose effectively. Let November be more than a month of reflection. Let it be a catalyst for transformative change. Together, let us chart a course towards innovation, ensuring our programs evolve dynamically to serve best the communities we genuinely care for.

May this season inspire reflection and action, propelling us collectively toward a future where our commitment to compassionate care stands as an unwavering testament to the well-being of those we serve.

Wishing you a season of renewal and transformative possibilities,

Aubrey Rhoden
Editor-in-Chief



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**"When we give cheerfully and
accept gratefully, everyone is
blessed." - Maya Angelou**

MOMENTS OF CONTEMPLATION: REFLECT AND RESET

Evaluating a PACE program at the end of the year is not merely about ticking boxes; it's about assessing the program's impact, fine-tuning strategies, and ensuring that the mission to provide comprehensive, compassionate care is not just met but exceeded. This process allows leaders to identify strengths, pinpoint areas for improvement, and align the program with the evolving needs of the elderly community it serves.

Allison (Alli) Ashley, BSN, RN, serving as the Vice President of PACE Growth and Participant Experience, teamed up with Eduardo Quezada, Director of Community Education & Intake, and John Tucker, MHA, Principal, to guide our most recent PACE Consortium quarterly call. In this synergistic session, the trio engaged in a thorough examination of the common challenges faced in PACE programs. They not only provided valuable insights but also shared successful solutions cultivated through their individual experiences.

To initiate the reflective process, we've compiled a set of questions designed to facilitate your journey. These thought-provoking queries are intended to guide and prompt consideration as you embark on your own exploration of PACE program dynamics

QUESTIONS ALL PACE LEADERS CAN ASK

- How is your intake process set up?
- Is your intake and outreach department aligned with your leadership and operational team?
- Is your messaging consistent throughout the entire process- from the first referral call to the enrollment?
- Is the handoff from intake to the IDT seamless, or are there unnecessary delays?
- What can your plan do to improve the participant/caregiver experience during the enrollment process?
- How long does it take people to move through the enrollment process? Are there unnecessary delays? Are there delays on your end?
- Do you have enough people to make this a seamless and timely experience?
- Is your team friendly and outgoing?
- Is your program creating positive momentum with future participants/caregivers from the point of referral through enrollment?
- Do you have a department structure and enough dedicated staff to support census goals?
- Do your team members have the right clinical and social skill sets?
- Are you targeting pockets of PACE-eligible participants within specific zip codes?
- How can you be more involved in the Medicaid application process?
- Does your team have a cheat sheet of documents Medicaid currently requests?
- Do you set clear expectations of how long the application process can take?
- Have you discussed adding additional support from an Elder Law/Medicaid Paralegal?

"The first step towards getting somewhere is to decide that you are not going to stay where you are." - J.P. Morgan

PACE CONSORTIUM



Connecting Voices

I believe the prosperity achieved by one program serves as a vital catalyst, nurturing the organic growth and development of another. This interconnected web of success not only fosters a sense of collective achievement but also plays a pivotal role in the continuous evolution and expansion of the PACE brand.

The PACE Consortium is dedicated to establishing a platform where our community can exchange ideas and successful solutions from their PACE programs. The featured advisors on our pages or in our quarterly calls have not paid for their spotlight. We aim to amplify voices in our community that genuinely emanate kindness and share a passion for witnessing others thrive. We are always on the lookout for compelling topics, stories, and leaders to endorse. Please reach out with any suggestions.

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HOW GOOD LEADERS BECOME GREAT

"The function of leadership is to produce more leaders, not more followers." - Ralph Nader

Securing the appropriate individuals for specific roles marks only the initial phase. As leaders, nurturing and perpetuating the passion evident in those we bring on board becomes imperative. We must kindle and maintain the unique flames within each individual. While it's common to concentrate solely on the participants' experiences, exceptional leaders recognize the importance of enhancing the overall quality of everyone's life.

Minor tweaks that can turn good leaders into great leaders:

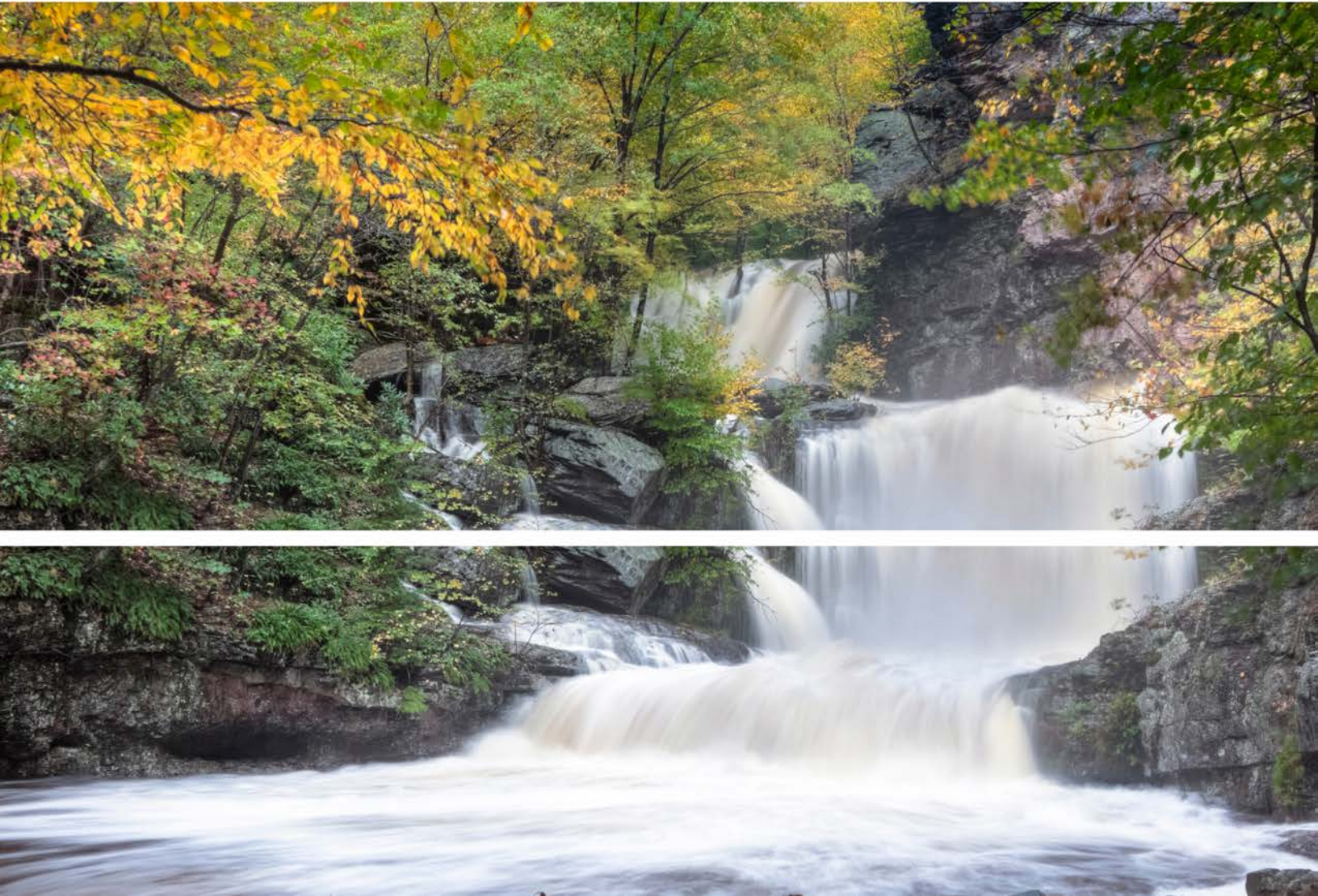
- Recognizing the importance of work-life balance and encouraging employees to take breaks, vacations, and time for self-care can significantly impact building a positive and appreciative culture.
- Acknowledge and respect the diversity of thoughts, backgrounds, and perspectives. Everyone brings something unique, and recognizing and respecting these differences contributes to a more inclusive environment.
- Encourage and empower others to express their ideas and take on challenges. Let them know you believe in their abilities and trust them to succeed.
- Understand and empathize with the feelings and experiences of others. This demonstrates that you care about their well-being and value them as individuals.
- Be open to new ideas and perspectives. Avoid making judgments hastily and be willing to consider alternative viewpoints. This shows that you respect the diverse thoughts and opinions of those around you.

STRONG CULTURES

- A study by Deloitte found that organizations with a strong culture are 3.1 times more likely to have high employee retention.
- Companies with a culture of innovation are more likely to outperform their peers.
- According to *Harvard Business Review*, there is a significant correlation between employee satisfaction and customer satisfaction.
- According to a study by the Corporate Leadership Council, companies with a positive culture experienced a 22% increase in profitability.

- Glassdoor reports that 77% of job seekers consider a company's culture before applying for a job.
- A report by the Katzenbach Center found that companies with a strong culture are 12 times more likely to improve business outcomes.
- McKinsey & Company reports that gender-diverse companies are 21% more likely to outperform others in terms of profitability.
- LinkedIn's Workplace Learning Report indicates that 94% of employees would stay at a company longer if it invested in their career development.

***pave the way for
collective
achievement***





**"The roots of all goodness
lie in the soil of appreciation
for goodness." - Dalai Lama**

FOSTERING FUTURE SUCCESS

EMPOWERING PACE TEAMS TO THRIVE

Mark Buchl: A Visionary Leader Transforming the PACE Landscape

In the dynamic realm of sales leadership, Mark Buchl emerges as a seasoned professional boasting an impressive 25-year track record of success. His journey into the world of PACE organizations began in 2019, a year that would test the mettle of leaders worldwide. Despite the challenges posed by a global pandemic, Mark orchestrated a remarkable enrollment surge, elevating figures from 2.5 to an astounding 6.2 per person within an enrollment team.

Mark's passion for PACE organizations goes beyond conventional leadership strategies. His mission is clear: empower PACE teams to survive and thrive in an ever-evolving healthcare industry. Through new perspectives, practical tools, and actionable tips, he fosters a culture of innovation and adaptability within PACE teams, leaving an indelible mark on the organizations he guides.

Championing PACE Beyond Boundaries: A Networking Odyssey

Establishing referral relationships in senior homes, hospitals, and specific senior markets represents low-hanging fruit in the PACE domain.



"If you change the way you look at things, the things you look at change."

Wayne Dyer

MARK BUCHL

MARK@MILEHIGHTIDE.COM

FOSTERING FUTURE SUCCESS

Mark suggests tapping into the local Business Networking International (BNI) chapters to broaden the reach and elevate PACE awareness. Great relationships make great referral partners, and BNI provides a hub of opportunity for PACE engagement.

Mark advises a strategic approach to BNI involvement, encouraging exploration before commitment. Surveying chapters, attending meetings, and educating potential partners about PACE creates a foundation for promising referral connections. His tip: don't limit networking to a single chapter—continue engaging across all chapters within your footprint.

Empowering Outreach Teams: A Strategic Approach

Guiding outreach teams to build and manage their teams is a crucial facet of Mark's leadership philosophy. Developing an engagement team with exceptional sales skills is imperative for PACE organizations to achieve their goals. Mark urges leaders to inspire their teams, framing the act of "selling" PACE as akin to saving lives and emphasizing the positive impact on seniors and their communities.

Great Teams, Great Routines: Structuring Success

Mark emphasizes the importance of routines for success. Advising set days for fieldwork, in-house tours, and administrative tasks, he underscores the significance of consistency in promoting productivity and creating a sense of structure. Communicating these routines to the team establishes accountability and support.

B2B and B2C Skills: The Art of Outreach

Mark divides training between referral development, education, and prospect interaction for effective outreach. He advocates injecting dynamism into meetings through roleplay, fostering team learning, and equipping everyone to navigate challenges independently. His advice includes creating a flexible script framework for PACE conversations, focusing on building rapport, discovering challenges, introducing solutions, and confirming interest.

Quality over quantity is Mark's mantra when it comes to funnels. According to him, a quality funnel lead must answer three crucial questions:

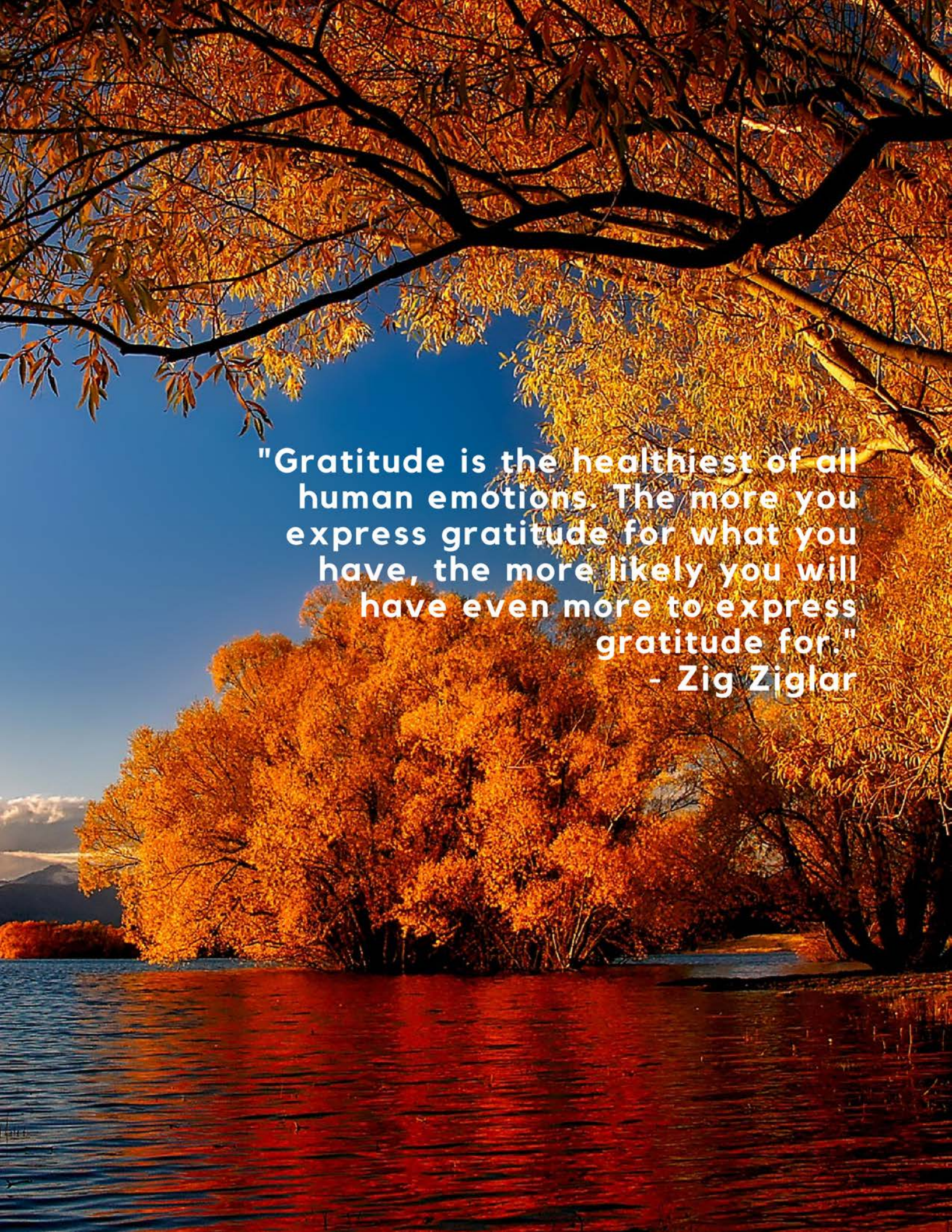
- What must happen to move forward?
- Who is taking the next step?
- When will the owner commit to doing it?

FOSTERING FUTURE SUCCESS

In the world of PACE organizations, Mark Buchl's legacy is one of collaboration, resilience, and a relentless pursuit of excellence. As he continues to champion the cause of PACE, his influence resonates throughout the industry, propelling teams and organizations to new heights of success.

"Leadership is not about being in charge. It's about taking care of those in your charge." - Simon Sinek





**"Gratitude is the healthiest of all human emotions. The more you express gratitude for what you have, the more likely you will have even more to express gratitude for."
- Zig Ziglar**



ORGANIZATION

Organizational prowess is essential for PACE programs' success in cultivating a thriving census. Staying meticulously organized is not merely a virtue but a strategic imperative. The ability to seamlessly coordinate outreach efforts, manage referrals, and optimize resources is pivotal in ensuring sustained growth. An organized approach enhances efficiency, streamlines communication, and allows for a proactive response to evolving needs. It empowers PACE programs to navigate the intricacies of participant enrollment, aligning resources with strategic goals and creating a robust infrastructure that facilitates continuous expansion. Staying organized is the compass that guides PACE programs toward sustained success in growing their census and fulfilling their mission to provide exemplary care to the community.

CHECKLISTS

SIMPLIFY THE PROCESS

New Medicaid for an INDIVIDUAL

Name _____ DOB _____ SS# _____

Income				
Income Type	Gross amount	How often	Verification document	Notes
RSDI (Social Security)			Social Security Benefit Statement or deposit stub	Total gross (before deductions) income must be less than \$2,742/month to qualify for PACE Medicaid.
Pension #1			Pension benefit statement or deposit stub showing gross payment and any deductions. Dated within the past 30 days, preferably.	
Pension #2				
Investment income			Statement indicating type, payment amount, schedule, and if full amount is accessible.	
Other				

Ask if they have any of the following less common types of income: rent, employment income, farm income, worker's compensation, income from a LTC insurance policy, alimony or child support, veteran's benefits

NOTES: Richard DeLeon
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MA App questions

Has the person applying for Medicaid been hospitalized, in rehab or a nursing home for more than 30 consecutive days total? If so, gather details.

Marital status
 Divorced, Never Married, Widowed

Unpaid medical expenses in the last three months

Citizenship Information
 - Is this person a U.S. Citizen or a U.S. National?
 - If yes, is this person a naturalized or derived citizen?
 - Alien Number:
 - Naturalization Certificate Number/Citizenship Certificate Number:
 - If not U.S. citizen or U.S. national, does this person have eligible immigration status?

Tax information
 - Does this person plan to file federal income tax return next year?
 - Will this person be claimed as a dependent on someone's federal income tax return?
 (Name of tax filer and how related)
 - Number of out-of-home dependents?

Ethnicity
 Hispanic/Latino, Mexican, Chicano, Mexican American, Puerto Rican, Cuban, Other:

Race
 American Indian/ Alaska Native (Tribe name)? Benefits? white, Chinese, Guamanian or Chamorro, Korean, Other Asian, Samoan, Asian Indian, Black/African American, Filipino, Japanese, Native Hawaiian, Other Pacific Islander, Vietnamese, Other

This is a screening tool only. Actual Medicaid eligibility is determined through the Department of Human Services.

Assets				
Asset Type	Amount	Location	Verification document	Notes
Checking account	(\$ value)		Statement from the last 30 days showing account activity, beginning and ending balances	Total assets must be less than \$2,000 to qualify for Medicaid.
Savings account	(\$ value)			
Other bank account(s)	(\$ value)			
Life insurance policy(ies)	(\$ value)		Life insurance policy. If not available, any correspondence from life insurance company.	
Annuities or investments	(\$ value)		Annuity statement. If not available, any correspondence from annuity company.	
Burial or funeral arrangements	(\$ value)		Statements or paperwork for any funeral plans	
Properties (esp. a home where they do not live)	(\$ value)		Deed to home or property	
Vehicle	(\$ value)		Title/registration and KBB value	
Other asset	(\$ value)		Proof of asset or cash value	

Ask if they have any of these less common types of assets: CDs, accounts closed or property given away or sold in the last 60 months (5 years), trusts of any kind, pending lawsuit settlements, land contracts, stocks and bonds, endowments.

Initials: _____ Date: _____

This is a screening tool only. Actual Medicaid eligibility is determined through the Department of Human Services.

New Medicaid for a MARRIED COUPLE

Person #1: Name DOB SS#

Person #2: Name DOB SS#

Income							
Person #1: Name			Person #2: Name			Information	
Income type	Gross amount	How often	Income type	Gross amount	How often	Verification Docs	Notes
RSDI (social security)			RSDI (social security)			Social Security Benefit Statement or deposit stub	PACE individual's total gross (before deductions) income must be less than \$2,742/month to qualify for
Pension #1			Pension #1			Pension benefit statement or deposit stub showing gross payment and any deductions. Dated within the past 30 days, preferably.	
Pension #2			Pension #2				
Investment income			Investment income			Statement indicating type, payment amount, schedule, and if	
Other							
TOTAL							

Ask if they have any of the following less common policy, alimony or child support, veteran's benefit

New Medicaid for a MARRIED COUPLE

MA App questions	# 1 NAME	# 2 NAME
Has the person applying for Medicaid been hospitalized, in rehab or a nursing home for more than 30 consecutive days total? If so, gather details.		
Marital status	<input type="checkbox"/> Married <input type="checkbox"/> Separated	<input type="checkbox"/> Married <input type="checkbox"/> Separated
Unpaid medical expenses in the last three months?		
Citizenship Information		
- Is this person a U.S. Citizen or a U.S. National? - If yes, is this person a naturalized or derived citizen? - Alien Number: - Naturalization Certificate Number: - Citizenship Certificate Number: - If not U.S. citizen or U.S. national, does this person have eligible immigration status?		
Tax Information		
- Does this person plan to file federal income tax return next year? - Will this person be claimed as a dependent on someone's federal income tax return? (Name of tax filer and how related) - Number of out-of-home dependents?		
Ethnicity		
Hispanic/Latino, Mexican, Chicano, Mexican American, Puerto Rican, Cuban, Other:		
Race		
American Indian/ Alaska Native (Tribe name? Benefits?) White, Chinese, Guamanian or Chamorro, Korean, Other Asian, Samoan, Asian Indian, Black/African American, Filipino, Japanese, Native Hawaiian, Other Pacific Islander, Vietnamese, Other		

MA Couples Checklist- Ensure BOTH individuals have:

New Medicaid for a MARRIED COUPLE

Assets (An IAA must be completed for couples. See policy for specifics on countable assets.)							
Person #1: Name			Both?	Person #2: Name			Notes
Asset Type	Amount	Location		Asset Type	Amount	Location	Verification Docs
Checking account	Avg balance:			Checking account	Avg balance:		Statement from the last 30 days showing account activity, beginning and ending balances
Savings account	Avg balance:			Savings account	Avg balance:		
Other bank account(s)	Avg balance:			Other bank account(s)	Avg balance:		
Life insurance policy(ies)	Cash Surrender Value:			Life insurance policy(ies)	Cash Surrender Value:		Life insurance cash surrender value stmt within the past year
Annuities or investments	Tot. value:			Annuities or investments	Tot. value:		Statement indicating type, amount, and if full amount is accessible/ withdrawal penalties.
Burial or funeral arrangements	Tot. value:			Burial or funeral arrangements	Tot. value:		Statements or paperwork for any funeral plans
Properties (esp. a home where they do not live)	Tot. value:			Properties (esp. a home where they do not live)	Tot. value:		Deed to property, taxable valuation statement (MI)
Vehicle	KBB Value:			Vehicle	KBB value:		Title/registration and KBB value
Other asset	Tot. value:			Other asset	Tot. value:		Proof of asset or cash value
TOTAL				TOTAL			

Ask if they have any of these less common types of assets: CDs, accounts closed or property given away or sold in the last 60 months (5 years), trusts of any kind, pending lawsuit settlements, land contracts, stocks and bonds, endowments.

through the Department of Human Services.
Date: _____

GREAT EMAILS

- Automated email campaigns have been shown to generate 320% more revenue than non-automated ones.
- Triggered emails based on user behavior can significantly improve engagement.
- Personalized emails can generate up to six times higher transaction rates.
- The average conversion rate varies by industry, generally around 1-5%.

- Segmented email campaigns can result in a 760% increase in revenue.
- Targeting specific audience segments with tailored content is a key strategy.
- The average open rate across all industries is around 15-25%.
- The average click-through rate is typically around 2-3%.
- Bounce rates, indicating the percentage of emails that couldn't be delivered, should ideally be below 2%.

hold the power to inform, inspire, and connect.



TIME IS VALUABLE USE TEMPLATES

Subject: Invitation to Tour - Learn About Our Comprehensive Adult Day Health Center

Dear [Insert Name],

Thank you for expressing your interest in the PACE plan. We appreciate your question and would like to tell you more about our all-inclusive adult day health center.

The PACE plan operates with a dedicated mission to serve the [Enter Your Catchment Area] community. To be eligible for our program, individuals must reside in our service area, meet the level of care qualifying for nursing home support (as determined through a home assessment with SC DHHS approval), be at least 55 years old, and demonstrate the ability to be safely cared for in the community.

Each location has a team of healthcare professionals collaborating to deliver comprehensive care. The goal is to keep individuals in their homes, within the community, and away from long-term care settings.

Upon enrollment in the PACE program, participants benefit from streamlined medical care. We have on-site primary care providers assigned to each center, including RNs, CNAs, social workers, dietitians, physical, occupational, speech, and activities therapists, drivers, and pharmacists. We offer medical support and can serve as each participant's social and recreational outlet.

We invite you to tour our center and meet our dedicated team. A personal visit will provide you with a firsthand experience of our facilities and the comprehensive care we offer. We are flexible and can schedule the tour at your convenience.

If you have any further questions or anything specific you would like to discuss, don't hesitate to get in touch with me via email at [Insert Your Email] or by phone at [Insert Your Phone Number].

Thank you again for considering PACE. We look forward to the opportunity to showcase our program and answer any questions you may have.

Talk soon,

[Your Full Name]

[Your Position]

[Your Contact Information]

PETE STARK: ARCHITECT OF ACCOUNTABILITY

Stark Law: A Legislative Legacy Shaping Healthcare Accountability

Fortney Hillman Stark Jr., known to many as Pete Stark, left an indelible mark on U.S. healthcare legislation during his tenure as a Congressman representing California's 13th and later 15th congressional districts. A stalwart member of the Democratic Party, Stark's influence reverberated through the hallowed halls of the U.S. House of Representatives, particularly in his sponsorship of what would become one of the cornerstones of healthcare regulations – the Stark Law.

Stark Law: Pioneering Accountability in Healthcare Referrals

In 1988, Congressman Pete Stark introduced a piece of legislation that would transform the landscape of physician referrals and healthcare transparency. Enacted as part of the Omnibus Budget Reconciliation Act of 1989, the Stark Law, officially titled the Physician Self-Referral Law, was crafted to address growing concerns surrounding potential conflicts of interest and financial incentives that could compromise the integrity of healthcare referrals.

Since its inception, the Stark Law has evolved through amendments and revisions, with additional regulations issued to clarify its provisions. While criticized for its complexity, the law remains a cornerstone of federal healthcare regulations. It ensures transparency and accountability in physician referral practices, playing a pivotal role in shaping the ever-evolving landscape of healthcare compliance in the United States.

At its core, the Stark Law sought to achieve three key objectives:

Preventing Overutilization:

Lawmakers recognized the potential dangers of **financial** relationships between physicians and entities to which they referred patients. The fear was that such connections might lead to unnecessary or inappropriate medical services, contributing to the escalation of healthcare costs.

Promoting Fair and Honest Referral Practices:

Stark envisioned a healthcare system where decisions were rooted in patient needs and medical necessity rather than financial considerations. The law aimed to foster an environment of fairness and transparency in the referral process.

Safeguarding Program Integrity:

Protecting the integrity of federal healthcare programs, particularly Medicare and Medicaid, was a paramount concern. The Stark Law was a bulwark against potential abuses, designed to maintain the fiscal responsibility of these essential programs.

"Tell me and I forget, teach me and I may remember, involve me and I learn."

- Benjamin Franklin

For PACE programs to expand, it's crucial to educate the community about their value. Foster meaningful connections with referral partners and share insights on the significant benefits and value offered by your PACE programs.

UNLEASHING THE POWER OF REFERRALS



To build strong partnerships for your PACE program, you can start by educating potential referral partners about the program's benefits through clear communication and engaging materials. Align missions by identifying shared goals and values, emphasizing the commitment to delivering high-quality care to the elderly. Support referral partners with tangible resources and streamlined processes, ensuring a seamless engagement. Share success stories to illustrate the program's positive impact, building trust and credibility.

Maintain open communication, regularly update partners on program advancements, and proactively seek feedback to address concerns. Enhance community presence through participation in local events, showcasing your commitment to community well-being. Disseminate knowledge through training sessions and tangible material dispelling misconceptions and ensuring you understand your program's offerings.

"Cultivate the art of connecting with people, and success will naturally follow."
- Deepak Chopra

The Gratitude Diaries: How a Year Looking on the Bright Side Can Transform Your Life- by Janice Kaplan

In this book, Janice Kaplan explores the impact of gratitude in various aspects of life, including work. She shares her personal journey and provides practical insights on how gratitude can enhance your career.

The Power of Gratitude: How Thankfulness Can Enhance Your Life and Work- by Colleen Barrett and Jack Canfield

This book discusses the power of gratitude in both personal and professional life. It provides practical tips and real-life stories of how gratitude can transform your work experience.

The Thank You Economy-by Gary Vaynerchuk

While not solely about gratitude, Gary Vaynerchuk's book emphasizes the importance of appreciating and engaging with customers and colleagues. It highlights how gratitude and genuine appreciation can positively impact your business and career.

The Positive Workplace: Building a Winning Culture for High Performance and Results-by Shawn Murphy

Shawn Murphy's book explores creating a positive and grateful workplace culture. It offers practical advice and strategies for fostering employee gratitude and improving the work environment.



THE FIVE LANGUAGES OF APPRECIATION

by Gary Chapman and Paul White

This book applies Gary Chapman's concept of love languages to the workplace. It discusses how people have different preferences for how they want to be appreciated, making it a valuable resource for showing gratitude to colleagues and employees effectively.

GRATITUDE



BOOKS

Leading with Gratitude: Eight Leadership Practices for Extraordinary Business Results- by Adrian Gostick and Chester Elton

Focuses on how leaders can harness the power of gratitude to boost employee engagement and improve business outcomes. It offers practical leadership practices to create a more grateful and productive work environment.

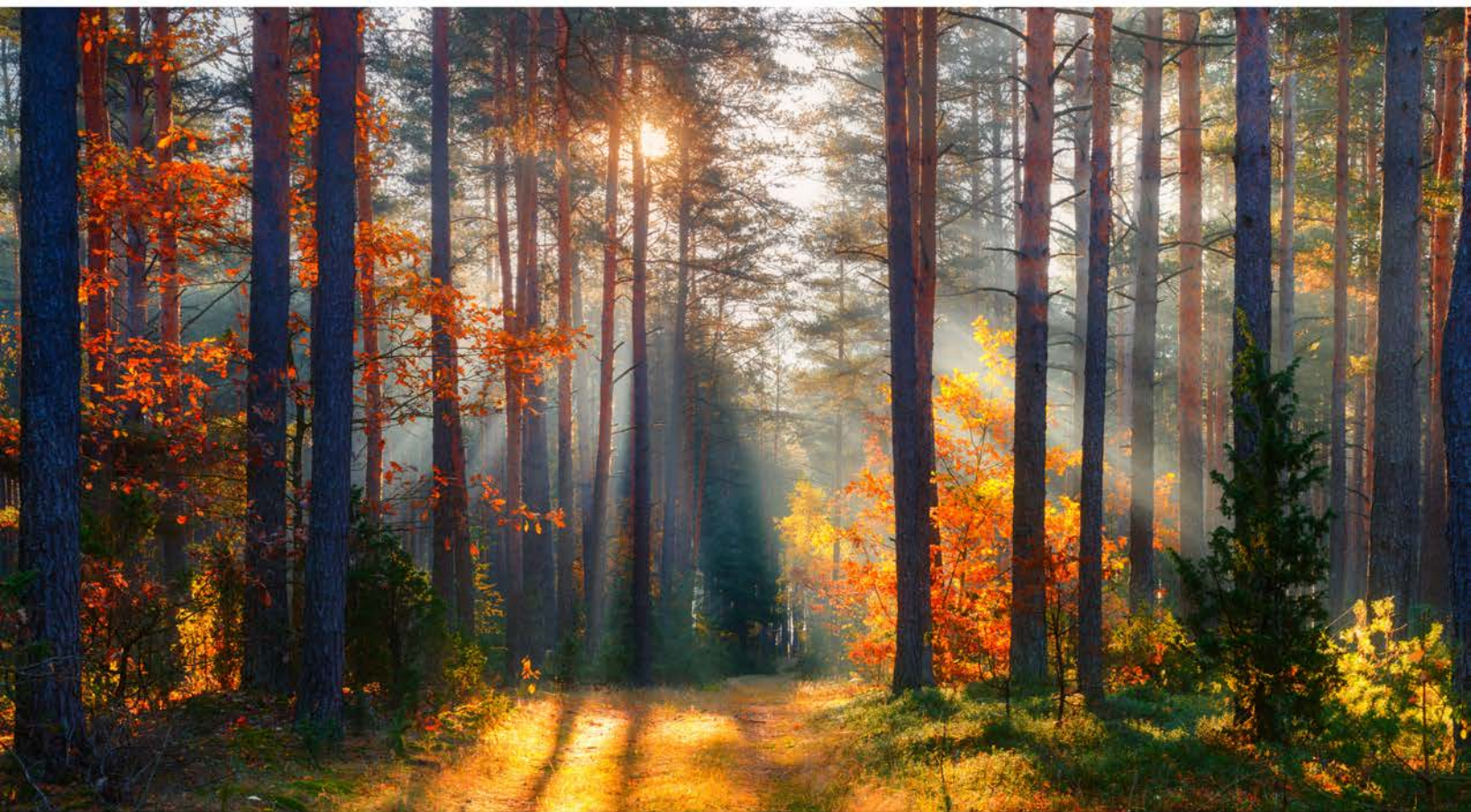
The Wisdom of Sundays- by Oprah Winfrey

The book features life lessons, and excerpts from these conversations, covering a wide range of topics such as love, mindfulness, gratitude, and finding purpose. It serves as a guide for readers seeking inspiration, wisdom, and a deeper understanding of life's profound aspects.



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Accelerate Innovation, Elevate Impact: Join the
PACE Consortium Today!



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