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## **Strategic plan 2019, 2020 & 2021 Part A:**

### **Methods and Evaluation of data from 2016-2018**

- *Expectations of Persons Served and Other Stakeholders:* All effected parties are surveyed. For the year 2019 our survey was switched to an electronic survey for the first time. “Survey Monkey” was used to gather information from Case managers, representatives of the State, The Bureau of Developmental Disability Services (BDDS), s Family members of persons served, other service providers and individuals that we currently serve, as well as individuals who we no longer serve (this was a new addition for 2019). Using the electronic survey doubled the number of respondents. However, for the 2020 survey we will be combining the electronic and paper surveys to better reflect the expectations of individuals who do not/cannot use the internet or email.
- *Information from the analysis of performance* was gathered using multiple means; Satisfaction surveys were helpful in an informal way. However, analysis of incident reports has been a major indicator of where we need to focus our energy to improve. In 2018 we changed our incident report analysis to include a larger group of professionals. Rather than just upper management, our incident reports are reviewed in real-time throughout the year by, not only the direct supervisor over the area where incidents occurred, but also staff with medical, social work and counseling/behavior management backgrounds as well. Other performance indicators we are currently employing include target behavior rates in individuals who we also serve in other capacities. Often, target behavior increases are directly related to issues like staff turnover and inconsistencies in following behavior plans, Interdisciplinary Support Plans as well as risk plans. Similarly, behavior data can, in rare cases, uncover severe issues like medication errors. Along with behavior data, the Zeilbeck Group monitors the relationship between Day program attendance, health factors, staff call-offs, staff trainings and turnover/burnout. We monitor our performance through formal team meetings, monthly and quarterly reports to and from the team as well as regular management meetings. Our communication within, and between services is open and honest. Our willingness to “tell on ourselves” is present from direct care staff to upper management. This openness is another positive aspect of keeping the company fairly small as compared to our competitors. While we provide a large number of services, we have continued to follow the same rule we have had since opening. We serve Districts 1 & 2. Our growth can continue through service additions and referrals. However, analysis of performance degrades the further a

company spreads itself which is not an avenue of growth the management team is willing to employ.

- Rather than increasing our market by growing to new geographical areas *Financial Opportunities* continue to present themselves in the form of new services and niches that we can adapt and exploit quickly. New service developments so far for this three-year period have included service rate increases. But more importantly, by staying up to date with changes within the state we learn of changes like the inclusion of state funded Care Giver Support Services. The Division of Disability and Rehabilitative Services, Bureau of Developmental Disabilities Services announced that Caregiver Support Services funds are now available for the state fiscal year 2020. The purpose of Caregiver Support Services is to provide short-term relief for the primary caregiver to the extent state funds are available during fiscal year 2020 (i.e., July 1, 2019 –June 30, 2020). Caregiver Support Services may be approved and accessed to an individual that meets the state definition of Intellectual and Developmental Disabilities level of care. TZG is in a great position to take on a large number of new referrals as a result of these changes. Our recruitment and retention of Respite Care staff will allow us to fill this need quickly and without having to drastic adapt our current services to meet Caregiver Support requirements. Due to this service being 100% state funded, TZG will not be simply scrambling for more of the federal funding that our current clients utilize via the Medicaid Waiver programs.
- *Service Area Needs:* The Division of Disability and Rehabilitative Services, Bureau of Developmental Disabilities Services is engaged in a two-year process to redesign Home and Community-Based Services Medicaid waivers for individuals with intellectual disabilities. Throughout this process, the Division has built in opportunities to hear from various stakeholders to ensure the state redesigns priorities and efforts align with the desires and needs of individuals with intellectual disabilities who may access our services. The Zeilbeck Group has, and must, continue to communicate with the state when open forums take place as they have done over 2018 and 2019 so far. We have also continued to have open dialog with BDDS throughout the years concerning service needs in our specific geographical and demographic areas. Along with our current lines of communication, we have identified specific members of our management team who have a *very* good rapport with the public face of BDDS. Over this 3year period TZG will work with the mangers who have cultivated these great relationships with the state so that process can be repeated by all of our managers as well as behavior consultants/therapists. Along with information going to and from the state, we have open lines of communication directly with all stakeholders via staffing interviews with employees that have been dissatisfied at other companies, input from community members via public forums, our web-site and Information gained through interviews conducted during the intake process provide insights into the service needs of the DD community. Our Facebook page has become a fantastic source of information for our company. As of the beginning of 2019 our page has over 1,500 likes/followers. Within the last 90 days of 2019 our posts were seen by roughly 45,000 people. Through these means we gain incites that larger companies have to pay consulting firms to generate. Over the next 3 years TZG will increase spending on “boosted” posts by 100%. Additionally, we have

discontinued the use of Indeed.com and Career Builder as avenues for new hires. Paid ads via social media have proven to be far more fiscally potent. Additionally, we will increase our contact through social media to improve upon the back and forth dialog with service recipients, possible referrals, individuals that we have served or employed in the past and other service providers. Due to the frankness of social media communications we get to hear of our successes. But, more importantly, community members feel more freedom in expressing service needs that we have failed to meet. A large part of the culture at TZG is to not be shy about asking about our errors and oversites. We have, and will continue to, demonstrate humility and a willingness to listen to negative, but constructive feedback. The community has, with a few exceptions, rewarded us with very constructive ideas and critiques. We will increase our social engagement by adding the rest of the management team as administrators to both the web-site, Facebook page, Twitter and Instagram.

*Demographics of the service area:* TZG has continued to grow within the Medicaid Waiver Program. Particularly, we have seen a 30% increase in the number of persons served within Lake County Indiana. Additionally, within district one, we continue to receive a large portion of *new* Medicaid Waiver recipients.

- *Relationships with External Stakeholders:* Discussions during IDT meetings are used in evaluating our relationship with external stakeholders, providers and state employees. A large portion of our incoming referrals are thanks to direct contact with the Bureau of Developmental Disabilities Services (BDDS). Similarly, word of mouth within the provider community continues to contribute to our consistent annual growth. Conversely, areas that need improvement are very often communicated to us directly (and long before a survey is sent out). This allows The Zeilbeck Group to be very dynamic in controlling and responding to issues/concerns within the provider community much faster than a larger, less personal organization could do.
- *The regulatory environment:* During the 2016-2018 period the state has become more aggressive in evaluating billing submitted by Medicaid Providers. This is a positive step towards getting funding to more individuals by cutting down on fraudulent and/or inflated billing. The Zeilbeck group has already taken a huge step in matching this push for billing transparency by adding to the supporting documentation required to submit billing and payroll claims. Just within 2019 so far TZG has seen a small, but recognizable, reduction in hours billed in all services. We will continue to push ourselves to do more than just follow the state and federal guidelines. We have, and continue to exceed the required documentation for direct care services through more comprehensive daily narratives. During the last two years, BDDS, through the Bureau of Quality Improvement Services (BQIS), has added a more rigorous certification and *recertification* process. During our last Re-certification “Cert” we passed all of the state’s requirements after only one change to our policy/procedures manual. We will continue to monitor changes in regulatory agencies by reading the newsletters that all members of upper management are subscribed to. Though the ever-changing regulatory processes can be challenging to keep up with, over the 2016-2018 period we have demonstrated, in a very formal way, that we are running an exceptional company.

However, during the 2019-2021 period we will continue to find areas where we can better conform to state and federal guidelines *before the regulating bodies have reason to investigate any of our actions.*

- *The Zeilbeck Group's Capabilities* continue to grow and progress as our market share of current services increases. Additionally, we have been very successful in employee retention, and recruitment, which allows us to respond quickly when another company loses business or major state changes occur. New and veteran staff alike are required for us to continue our history of stepping in quickly when a changer occurs. In addition to this ability to respond, TZG provides a very wide variety of services. This allows each program to “feed” the others with referrals. The knowledge base due to this diversity of services within our corporate culture often works to find solutions, quickly and creatively that a company with a background in only one type of service delivery cannot offer. We will continue to diversify our service offerings over the next 3-year period. We will also develop a specific growth plan to this end.
- Along with our other assets, increased use of *technology to support efficient operations and service delivery* has continued to outweigh the cost of necessary equipment and consumables. Over the course of 2018 TZG increased its use of electronic communications for the substantial amount of written narratives our staff generate. Not only has this improved their accuracy of our billing and payroll, it has also reduced costs due to employee time tracking errors. Additionally, all members of TZG management are provided with a cell phone and laptop computer in order to be available on very short notice. This has allowed our teams to converge on a developing problem very quickly due to never really being entirely out of communication (with some exceptions). Due to improvements in the size and cost of very high-resolution scanners TZG has been able to eliminate some of the driving our payroll team must do to collect all of the supporting documentation required to pay our (now over) 250 employees. As mentioned in other areas of this plan, our communication with the community at large, as well as specific teams, benefits greatly from the management team having access to the internet at all times. The transmission and sharing of ideas and solutions also aids us in service delivery. With the communication we achieve with these devices, very rarely is there an question that someone who is readily available cannot answer. Over the course of 2019-2021 we will increase the use of electronic forms for the provision of not only behavior management services, but all direct care services as well.