

Success Stories

How Elder Services of the Merrimack Valley Replicates Its Cross-Sector Partnership Successes

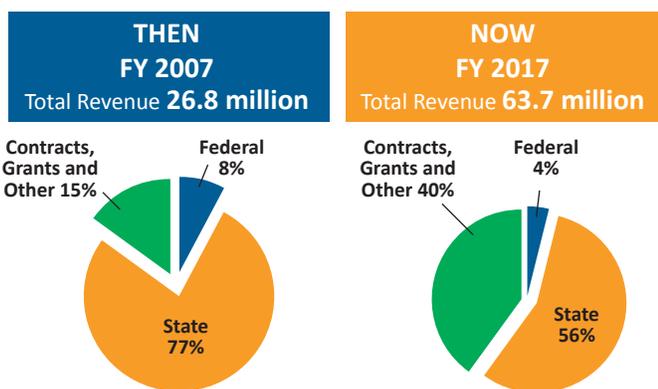
“Timid” is a word that doesn’t seem to exist at Elder Services of the Merrimack Valley (ESMV). At this private nonprofit Area Agency on Aging supporting older adults and people with disabilities in northeast Massachusetts, there is a fearless, let’s-make-things-happen energy that you can’t help but notice from staff at all levels across the organization. And this energy goes beyond values: **ESMV has translated this attitude into a culture that has been the springboard for a robust portfolio of cross-sector partnerships and community results.**

The origins of ESMV’s robust cross-sector partnerships can be traced to 2004, when Massachusetts mandated that special needs plans partner with Area Agencies on Aging to address the long-term support needs of individuals who are eligible to receive both Medicare and Medicaid. This experience allowed ESMV to take advantage of the later passage of the Affordable Care Act, which stimulated experimentation in the way care is delivered and reimbursed. It also encouraged organizations across the health and social sectors to work together to reduce costs and improve quality. After participating in the Centers for Medicare & Medicaid Services’ (CMS) Community-based Care Transitions Program (CCTP), ESMV leadership realized the success of the program and thought, “This model works. We can make this sustainable even after the pilot concludes.”



With this new strategic direction, ESMV eventually secured more than 20 cross-sector partnerships with numerous health care entities, such as hospitals, payers, accountable care organizations (ACOs), Programs for All-Inclusive Care for the Elderly (PACE) and primary care practices. The organization has more than doubled its staff and revenue over the last decade, achieving a significant decrease in reliance on state and federal funding (26 percent and 50 percent decrease, respectively). The success is not limited to ESMV, as its health care partners and clients are also experiencing the value of improved outcomes, such as an 11 percent reduction in hospital readmissions within 30 days, an 18 percent increase in scheduled physician visits within seven days of discharge, a 15 percent decrease in emergency department visits and an 11 percent reduction of health care spending.

Of course, you don’t get these kinds of results based on culture alone. So how does ESMV do it? What has enabled this organization to replicate success so many times? There are some common denominators that form the foundation of ESMV’s partnership success.



- Agency **REVENUE** and **STAFF** more than **DOUBLED** in 10 years
- **26% decrease** in reliance on state funding
- **50% decrease** in reliance on federal funding
- **137% increase** in contracts, grants and other

Leave No Stone Unturned

One factor underlying each of ESMV's partnership successes is the idea that if there is possibility, ESMV goes for it. "If there's an opportunity to be had, even if it's remote, we make a point to look into it," shares Joan Hatem-Roy, ESMV's Chief Executive Officer. "Don't close an open door; don't let anything slip by."

ESMV's many productive partnerships run the gamut from ACOs and Managed Care Organizations, to primary care and telehealth technology providers. Designing and building such a diverse portfolio took vision and a willingness to explore opportunities outside of the norm. This leave-no-stone-unturned attitude is a cornerstone of ESMV's partnership success, but it's how the team puts this tenacious attitude into practice that makes all the difference.

What does it mean to leave no stone unturned? At ESMV, it comes down to building an organizational structure where every staff member is encouraged to participate in finding, vetting and incubating partnership opportunities, which the team calls "new innovations." It also includes paying close attention to ESMV's infrastructure, which has provided the foundation for successful contracts.

Evaluating and pursuing new partnership opportunities is on the agenda at numerous regular meetings. "Each week, we have a meeting with our core leadership to discuss new opportunities," says Jennifer Raymond, ESMV's Chief Strategy Officer. "Every other week, we hold the same type of meeting, only we include everyone on the director level. These aren't quick meetings, either; we've made it a priority to spend time making informed decisions about what to explore now, what to put on the back burner and what to pass on." The largest factor in the decision-making process is an alignment with ESMV's mission and values, which include empowering consumers with the information, resources, programs and services necessary to meet their individual goals for living successfully in the community. Additional considerations when taking on a new opportunity include the impact of the work on the critical and foundational strategies of the organization and the ability to collaborate with community partners to make the innovation successful. For example, when presented with the opportunity to address the needs

of a younger Medicaid population by contracting with newly developed MassHealth ACOs, ESMV seized the opportunity only after securing the commitment and partnership of its local disability colleague, the Northeast Independent Living Program.

What makes ESMV different is that these discussions don't end with the leadership team, as they recognize that the champions of the organization's efforts must go beyond its leaders. To instill this practice, ESMV's monthly all-staff meetings include discussions of potential innovations, and everyone, regardless of role, is encouraged to add their perspective to the discussion.

For instance, if an opportunity passed the test in the weekly core leadership meetings, a member of the leadership or director team then presents the idea at the all staff meeting. "We have a three-part presentation template that forces us to boil it down by articulating the opportunity, sharing why we want to pursue it and explaining what it means for our staff," says Raymond. By encouraging everyone to be part of making new opportunities happen, ESMV leaders task staff members with not only delivering the right services once partnerships are live, but also in the strategic decision-making process about which opportunities to pursue—or not.

In addition, ESMV conducts monthly professional development sessions for staff that cover a variety of topics. "Everyone is encouraged to attend, whether the topic is related to their job title or not," shares Raymond. "This continuous exchange of ideas shapes our partnership work—and creates greater awareness of what we do and what is possible for us to achieve as an organization." Professional development sessions often include continuing education units (CEUs) for social workers and nurses, which tends to incentivize attendance and promote professional growth.



Now building a tenacity-driven culture doesn't happen overnight, but there are some initial steps your organization can take if this is an area it would like to develop. Make space in your weekly and monthly schedules to truly focus on energizing the people in your organization to put on their innovation caps. Consider introducing a knowledge-transfer initiative where staff learn about the work being achieved by other departments, hosting a new style of professional development course, or reimagining your staff meetings to encourage more "are we leaving stones unturned?" conversations where all levels of staff are empowered to think creatively.

Rethink the Meaning of the Word 'Competitor'

The second common denominator is a willingness to reframe a competitor as a potential partner. "Let's face it: there's competition everywhere we look. New entrants are coming into our space whether we like it or not, so the question becomes, 'How will we respond?'" Hatem-Roy explains. "We look at the idea of competition in a new way. Is there a risk someone could steal our intellectual property? Sure. But the bigger risk is if they build it without us and end up leaving us behind."

When ESMV became aware of a grant opportunity from the Centers for Disease Control and Prevention (CDC) for innovative statewide approaches to arthritis management, it developed a partnership with a competitor for a good reason—it made sense. "In this situation, the state informed both sides that we were each looking into the grant, so we made a point to sit down and talk about it," says Raymond. "These were not easy conversations, but we both decided that if there is a stronger path to success that includes an equal partner, it's worth exploring. We ended up striking an agreement on a five-year, multi-million-dollar proposal that was ultimately very successful. In the end, we got funding for work that will reach many people, and I don't think either of us could have done it without the other."

It's important to remember, too, that the competitive landscape is changing. With the lines continuing to blur between the health and social sectors, community-based organizations may increasingly see new types of competitors in their communities, but if they take a page from ESMV's book, they may be able to turn competition into a strategic partnership.

If a new competitor—that may in fact be a possible collaborator—crops up, ESMV does its homework and then engages in a conversation. By talking through each entity's service offerings, ESMV looks for areas where the agency could complement the other organization and offers ideas where ESMV could add value in a collaborative setting.

Sometimes, a potential competitor can become a collaborator simply when they gain a greater awareness of what you do. For instance, when ESMV began speaking with a start-up telehealth technology provider about possible areas of mutual interest, it looked like there could be a potential area of competition when it came to the health navigators service. But, after an illuminating conversation about what ESMV's staff was equipped to handle—including taking on the navigator work—the mindset across both organizations switched from "there are aspects to their business model that could compete with our service offerings" to "they understand now why we are best positioned to take on this aspect of the work."

“If you decide you’re not ever going to look at a competitor as a potential collaborator, you’re leaving space for everybody else who is a competitor to take that and run with it,” warns Raymond. “Your competitors could partner with each other—then what? I’d rather be the entity bringing competitors together as opposed to being on the menu when they come together at their own table. If you think people who are competitors are always going to stay in their lane, you might be left out at the end.”

Know Your Value and Communicate It with Confidence

The third factor in ESMV’s arsenal is understanding your organization’s value—and making sure others understand it as well. “We have spent a lot of time trying to really understand our value. And I don’t mean just the services we offer, but the value we can bring to a partnership and to the community,” says Raymond. “For instance, when a member of our leadership team sits down to talk with a new health care partner, they feel confident in saying that ESMV will provide the service you said you need, but if we do only that, you may be missing ESMV’s value to help you in other ways, such as tapping into our talent and expertise to provide behavioral health counseling, nutrition services and disease management.”

Understanding your organization’s value builds off of engaging competitors and searching for opportunities—where a tenacious, collaborative culture combined with a willingness to reframe competition and challenges culminates in a culture of accountability in action. Here, ESMV goes beyond the typical quantity measures of saying, “We served thousands of people this year” and instead assessing the quality and impact of the service. The shift in focus from *quantity* to *quality* contributed to ESMV’s recent pursuit and achievement of a three-year accreditation by the National Committee for Quality Assurance (NCQA), which helps to demonstrate ESMV’s commitment to quality service.

Before jumping into the work of finalizing a partnership agreement, ESMV thinks about how to measure success, and uses satisfaction surveys, patient activation measures and patient-reported outcomes to capture information that demonstrates how well they are performing. Instead of focusing only on the number or people served or the number of services provided, ESMV can provide evidence that the outcomes are there because of ESMV’s services. For instance, ESMV uses their outcomes-focused surveys to communicate points such as: how did compliance rates change with individual care plans, by how much were fall rates reduced and to what extent are patients and caregivers more satisfied with their programs and care.

It’s one thing to conduct an internal rethink on metrics and measurement; it’s another to take those results and use them to communicate influentially with partners and potential partners.

“One example that illustrates our focus on outcomes accountability is with one of our dual-eligible health plan partners here in Massachusetts,” says Raymond. “They were struggling with no-shows, non-compliance with care plans, and even some members leaving to go to competitor plans. When we did a pilot program to provide a suite of evidence-based programs to their members, we collected data based on satisfaction and we were able to illustrate within six months that the people served by the program had increases in care plan activation, compliance and confidence. Being able to demonstrate and communicate our value in that way was the reason that we still have a contract and strong relationship with this partner to this day.”

One way that ESMV gets serious about elevating the organization’s value is by convening meetings at which local organizations focused on community health can talk shop. Yvette Bailey, Director of Case Management at Anna Jaques Hospital, a longtime ESMV partner, has seen this in action. “ESMV is like our community think tank,” she says. “They don’t just join the conversation, they lead the conversation in our area. They proactively bring different players together to ask: How can we help you? How can we add value? Where can we do more? To me, that is visionary.”

As ESMV demonstrates, recognizing the value your organization brings to a partnership and articulating it in a way that means something to potential and current partners fuels the replication of success. This requires going beyond a theoretical conversation and demonstrating substance as to what “value” means, using outcomes and examples. Once you have established what you can achieve and bring to a partnership, ensure that this is understood throughout your organization—and don’t underestimate the value of practicing the delivery of this message. This will ensure that you will be ready when opportunities, whether formal or informal, arise. Though it is important to proactively schedule and engage in conversations and meetings with your desired audiences, it is equally important to be prepared for unexpected opportunities to educate others and raise awareness of the extent of the value you can bring to the partnership.

Blazing Trails

As one of ESMV’s partners, Bailey, puts it, “Anyone in health care knows we need to be innovative and think of ways to be of service to people while being sustainable and nimble in an environment that can require change at the turn of a dime. People are in the hospital for a short time, so we need strong relationships with community organizations to ensure positive outcomes once they leave our building. We have that in ESMV. They have such a strong culture of service, producing results and understanding their mission.”

With its common denominators driving decisions and behaviors both internally and externally, ESMV is changing the meaning of organizational culture from “*this is what we believe*” to “*this is how we operate*.”



So often we hear the same push to enhance or revitalize our culture, but that’s only the beginning. As ESMV shows, it’s how an organization operationalizes its culture that will propel its ability to explore more cross-sector partnership opportunities. So what’s next for ESMV? Even with its success, ESMV continually looks for ways to improve. This includes further instituting the practices and processes that comprise their organizational culture by making them documented policies. And, of course, they will continue to respond to and seek new opportunities for partnership and to raise the awareness of ESMV’s vital role within the community.

The authors are grateful for the time and insights provided by those who were interviewed for this piece, including Joan Hatem-Roy, ESMV Chief Executive Officer; Jennifer Raymond, ESMV Chief Strategy Officer; and Yvette Bailey, Director of Case Management at Anna Jaques Hospital.

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