



Informing Policy. Advancing Health.

Dear Selection Committee Members,

Colorado faces a demographic sea change over the next decades.

By 2030, more than 1.2 million seniors will live here, more than doubling 2010's 65+ population. And Colorado will be aging faster than most other states over that time.

The implications for our state are wide-ranging. There will be downward pressure on taxes, increased demand for health care, a rising need for public services, a significant shift in the workforce and a focus on new kinds of housing.

All of us will be affected in one way or another, some of us profoundly, as we age ourselves or as we care for our loved ones. Our communities, our businesses, our public institutions and our economy will be impacted as well.

Colorado's lawmakers created the Colorado Strategic Action Planning Group on Aging to address this urgent public policy challenge. The group is charged with developing a strategic vision and actionable recommendations to prepare for Colorado's senior tsunami.

This forward-looking effort stands to place Colorado among the nation's leaders in proactively planning for its aging population.

The Colorado Health Institute (CHI) is proud to submit this proposal to support the Planning Group. As a nonpartisan health policy research institute with more than 13 years of experience analyzing Colorado's health and health policy issues, CHI is uniquely positioned for this work.

We have a deep understanding of Colorado's aging and long-term services and supports (LTSS) landscape, a proven track record of project management, experience working with diverse stakeholders and recognized communications expertise.

Delving into our specific qualifications, we can start with our LTSS work. We have focused on issues around workforce, federal and state programs, quality of care and financing. We've researched Colorado-specific issues while also drawing on lessons from other states as well as the public and private sectors.

CHI is applying for project management services and intends to apply for the data and research services as well. We believe that having one organization managing the project and providing data and research will be the most efficient and effective way to ensure that the Planning Group meets its aggressive time frame and achieves its ambitious objectives.

We are known as an organization that gets projects done on time and on budget.

CHI has provided research, project management and facilitation support for legislatively-appointed commissions such as the Long Term Care Advisory Committee, Long Term Care Transitions Work Group and the Colorado Alzheimer's Coordinating Council.



Like the Planning Group, these committees were charged with developing actionable policy recommendations. We helped them to hone in on the appropriate research questions, develop focus areas and select the best resources for understanding the problem and arriving at policy option recommendations.

For this project, CHI has developed an approach that relies on a three-pronged framework.

- First up will be establishing goals and deciding on the research criteria to help focus the Planning Group's work.
- Second will be synthesizing the relevant data and helping to put it into a context that best supports the decision-making that must be done by the Planning Group.
- Third will be effectively disseminating the findings of the Planning Group in ways that support policymakers moving forward but also build in public education about this issue and support for the Planning Group's work.

Within each part of this framework, we are presenting "Strategies for Success," the specific steps we will take to ensure that the work of the Planning Group is of the highest quality.

Our approach allows the necessary time at the beginning of the process to create a solid foundation of understanding and collaboration among members of the Planning Group. After that, CHI will provide the information, analysis, resources and support that will let members thoughtfully deliberate and make careful decisions.

We have assembled a skilled team, led by President and CEO Michele Lueck and Senior Director for Policy and Analysis Amy Downs. Michele is a proven leader and strategic thinker with an aptitude for thoughtful and productive facilitation. Amy is a skilled project director and a leading health policy researcher with more than a decade of experience studying LTSS in Colorado.

The team will also include Senior Director for Communications Deborah Goeken, Policy Analyst Natalie Triedman and Sara Schmitt, who is our Director of Community Health Policy. Finance Director Tim Dunbar and Manager of Creative Services Brian Clark will also be on the team.

CHI understands the urgency of this work and endorses its potential to help millions of Coloradans live better lives in the coming decades. We believe that this will help to make Colorado a healthier state for all of its residents.

Sincerely,



Michele Lueck  
CEO, Colorado Health Institute





# Strategic Action Planning Group on Aging

The Colorado Health Institute's  
Project Management Proposal



SEPTEMBER 30, 2015



## Proposal

The Colorado Health Institute (CHI) is well-qualified to support the work of Colorado's Strategic Action Planning Group on Aging. We are respected statewide and nationally for the accuracy and relevancy of our research. We are strong coordinators and facilitators. We are accomplished in contractor management. And we are award-winning communicators of health policy.

Taken together, these qualifications ensure that CHI will be able to help the Planning Group successfully accomplish its mission.

We will develop a framework that allows for a structured approach to goal-setting and prioritization. We will promote bi-directional communication channels between Planning Group members, partners and the public in order to provide transparency, promote awareness and create buy-in and support for the Planning Group's objectives.

And we will create meaningful and impactful reports that are accessible to many audiences, including policymakers and community leaders.

We are pleased to offer these details to support our proposal for project management services.



## Project Approach

CHI has developed an overarching management approach for this project that relies on a three-pronged framework.

We believe that this proposed approach will offer Planning Group members the most time to dig into the research, understand its context, consider the implications, learn about policy options that have worked in other states and new ideas that are beginning to have traction.

It will then allow for mindful consideration that results in the strongest recommendations for Colorado's policymakers.

Our overarching plan, the big idea for the Planning Group, is to:

### Our Understanding of the Project

House Bill 15-1033 charges the Planning Group with developing a comprehensive action plan for responding to Colorado's aging population. The Planning Group's work will identify the opportunities and challenges that Colorado's demographic changes present for public programs and services, private businesses, communities and families.

The Planning Group's research scope is necessarily broad in order to assess the diverse impact that aging has on the public and private sectors. But it needs to be organized to yield concrete and realistic outcomes, including specific recommendations that address state and local strategies and solutions. The Project Manager, supported by an Assistant and a larger project team, will coordinate all aspects of the Planning Group's work to ensure that actionable recommendations are submitted to the General Assembly by November 30, 2016.

1. Establish Goals and Decision-Making Criteria.
2. Synthesize the Research.
3. Disseminate the Findings (See Figure 1).

Under each area, we are proposing specific "Strategies for Success," detailed steps to ensure the best process and the strongest deliverables (See Figure 2).

### 1. Establish Goals and Decision-Making Criteria

We will set aside time up front to help the Planning Group arrive at goals, objectives and priorities. The broad scope of the mission requires strategic prioritization to reach consensus about the criteria that will shape the decision-making process. Our experience suggests that this time is invaluable in setting the foundation for success.

#### Strategies for Success:

##### A. Set Ground Rules

This will ensure that Planning Group members work together efficiently and make timely decisions. CHI will:

Figure 1. CHI's Project Approach



- Clarify when and how materials and information will be shared and identify methods for sending feedback.
- Work with the chair and Executive Committee to identify an approach for gaining consensus and then present it to the full Planning Group for review and approval.
- Identify strategies for incorporating input from all voices, helping to ensure support and buy-in statewide for the Planning Group's work.
- Present a decision-making tree that establishes method for reaching consensus.

### B. Define Goals and Objectives

Narrowing the focus and setting priorities will be essential

in order to reach meaningful recommendations in a short amount of time. CHI will:

- Learn from the chair and Executive Committee about the work that has already been done. Study HB 15-1033 for further guidance.
- Present information and help to facilitate a discussion about the goals and objectives, along with criteria for prioritizing issues.
- Write a draft of the proposed goals, objectives and prioritization criteria for Planning Group members to review, based on that discussion.
- Finalize the proposal after all input has been received.

**Figure 2. Strategies for Success**



## C. Design the Work Plan and Timeline

A schedule that includes intermediate and final deadlines as well as the work plan to meet them will be essential. CHI will:

- Help to identify a strategic work flow that includes subcommittees, assignments, individual work by members as well as research and analysis.
- Propose intermediate and final deadlines.
- Schedule all Planning Group and subcommittee meetings through fall 2016.
- Create a plan for posting minutes, documents, presentations, research and other materials on the website.
- Create a social media plan.
- Plan opportunities for public input.
- Design processes for communicating with key stakeholders.
- Present the work plan and timeline to the Planning Group for final review and approval.
- Help to keep subcommittees and the Planning Group on schedule to meet all intermediate and final deadlines.

## 2. Synthesize the Research

CHI's skill at understanding how to synthesize reliable data and put it into context will inform the work of the Planning Group. Information and evidence will serve as the basis for the final deliverables, including the strategic vision and actionable recommendations.

### Strategies for Success:

#### A. Identify Research Questions

The Planning Group must decide on the research questions that are most relevant to its work in order to be most productive. CHI will:

- Present the most relevant and reliable data and information resources, helping the Planning Group to better understand why some are more trustworthy than others.
- Support a discussion with the Planning Group to arrive at the research questions. Analyze the selected data, extracting key findings, putting it into context and explaining it.
- Summarize the most useful policy implications from the information for consideration by the Planning Group.
- Write succinct and informative summaries of the research for the Planning Group.

## B. Reach Actionable Answers

Deciding on the questions is the first step. Answering them is the next, a process based on research, analysis, discussion and collaboration. CHI will:

- Help subcommittees navigate their work.
- Summarize decisions of the subcommittees.
- Write reports to be shared with the Planning Group.

## C. Goal-Oriented Meetings

Time is valuable for Planning Group members and must be used efficiently. CHI will:

- Establish goal-oriented agendas in order to focus on content, decision making and recommendations.
- Work with committee and subcommittee chairs to help identify the goals, objectives, and decision items to include in the agendas. Support chairs with meeting facilitation.
- Send the information, background research, agenda details and logistical information in advance of scheduled meetings so that members may prepare in advance and full participate in informed decision-making.
- Create bi-directional communications between the Planning Group and stakeholders to ensure transparency as well as input from experts throughout the state.

## 3. Disseminate the Findings

Communicating the work of the Planning Group will be a key component of its success. Not only should stakeholders understand the process and reasoning behind the findings, but highlighting this work can help educate and engage the public on this issue.

### Strategies for Success:

#### A. Internal Communication

Planning Group members must have strong and regular communication to stay on the same page and understand where they are headed. CHI will:

- Take detailed notes of every Planning Group meeting as well as every subcommittee meeting. We will create a consistent template to ensure clarity.
- Post the notes on the website.
- Work with Planning Group members to identify action items and responsibilities moving forward.

#### B. External Information-Sharing

Building support and excitement about the Planning Group's work can flow from good external communications. CHI will:

- Work to make the website dynamic. Ideas include blogs from CHI or Planning Group members.
- Create a Twitter hashtag and schedule regular tweets about the Planning Group's work.
- Target local media for potential stories as the work continues.

#### C. Public Engagement

Actively engaging Coloradans will strengthen the deliverables, generate support for the work and heighten understanding of this issue. CHI will:

- Include the Planning Group's email address ([agingstrategy@state.co.us](mailto:agingstrategy@state.co.us)) and Twitter hashtag in all publications and materials to encourage questions and comments.
- Build and maintain an online calendar of all Planning Group events.
- Ensure that Planning Group meetings are accessible to all Coloradans. They will be hosted via ReadyTalk/GoToMeetings. Each meeting will include time for public comment.
- Provide a monthly update by email to all Planning Group members and the Executive Committee.
- Communicate as appropriate with the legislature, the governor and executive branch, county commissioners and other stakeholder groups. Support communications between Planning Group members and policymakers, including briefing materials and talking points.
- Prepare all reports, including the final plan and recommendations.





# Project Management and Coordination

CHI produces work of the highest quality under tight time constraints. Our collaborative and team-based approach to projects, paired with our rigorous and systematic method for quality control, yields engaging, accurate and influential findings.

## Approach to Quality Control

Quality control is interwoven into every CHI project. Because our reputation hinges on our ability to produce polished and accurate work, we have identified effective quality control strategies.

CHI's team approach allows for separation between the team leaders and those involved in the review process. Our experience has shown that having fresh eyes on a project is an invaluable step.

Every product – from presentations to newsletters to high-profile reports – is reviewed by one of CHI's content experts as well as an editor and is checked for accuracy. Each data point is double-checked and references are read to ensure that interpretations are accurate.

We have refined this process over time, and typically complete it within one to two days.

We will use this process with the Planning Group's work. The lead project team will gather information, write reports and edit them. We will then tap other CHI analysts for additional research as well as fact-checking.

Quality control, however, is about more than grammar and data. It requires a mechanism for ensuring that the work meets goals and objectives throughout the project. We will work closely with the Executive Committee to make that happen.

These varied approaches to quality control will hold ourselves and the Planning Group accountable and ensure that we produce meaningful, accurate and quality work for Colorado.

## Process for Staying on Time and on Budget

Having several subcommittees, a Technical Advisory Committee and an Executive Committee will support the Planning Group's goals, but it must be skillfully coordinated.

CHI has the skills and experience to effectively coordinate all of these efforts. The Project Management team will provide the Planning Group with timely and comprehensive accounts of all meetings.

Monthly reports by CHI will emphasize the Planning Group's progress in meeting specific action items as well as overarching goals and objectives. The reports will identify key milestones that have been accomplished, as well as those that are forthcoming, along with action items and responsible parties.

With the timeline and the budget in mind, CHI decided to apply for both the project management and the technical work. This will streamline communication and reduce unnecessary steps.

Tighter feedback loops between CHI's management and research staff, the chair and the Executive Committee can significantly improve efficiency. CHI has the management skills, content expertise and staffing bandwidth to excel in both roles for the Planning Group.



## Appropriate Subject Matter Expertise

CHI is skilled in the collaboration that can make a real impact at both the local and state levels. We have facilitated groups working to transform health care in Colorado, we have led meetings across the state to spur economic development in the health and wellness sector, and we have supported volunteer committees in developing recommendations for legislative action.

All of this requires a rock-solid understanding of Colorado's health and health care landscape. This begins with our 13-plus years of focusing on health and health care data. Because of our work in the field of primary data

collection and policy analysis, we bring methodologically sound approaches to current policy issues in a fast, deadline-driven time frame.

Our work increasingly includes serving as expert facilitators and supporting collaboration. We have led these types of projects both inside and outside of the Long-Term Services and Supports (LTSS) field.

Here are some examples of our work.

#### **Long Term Care Advisory Committee (SB 05-173).**

CHI provided support on research and analysis, facilitation and writing for the Long-Term Care Advisory Committee, a group charged with studying policy solutions that would allow Medicaid to serve as a client advocate and be an efficient and effective payer and provider of services. CHI coordinated meetings among the 21-member Committee over ten months and prepared their final report for the Joint Budget Committee which included a set of actionable recommendations, similar to the work of the Strategic Action Planning Group on Aging.

#### **Long Term Care Transitions Work Group (HB 07-1374).**

CHI facilitated meetings for the Long-Term Transitions Working Group and also prepared its final report to the Colorado Department of Health Care Policy and Financing, a requirement specified in the bill. The Working Group was authorized to recommend options for improving access to long-term services and supports for eligible Medicaid clients. The report outlined system problems and proposed policy recommendations.

#### **Colorado Alzheimer's Coordinating Council (SB 08-058).**

CHI was selected as a contractor to facilitate, staff and write meeting minutes for the Colorado Alzheimer's Coordinating Council, a group authorized by the legislature to create a state plan for Alzheimer's disease. Similar to the Strategic Action Planning Group on Aging, the Council was charged with making recommendations for improvements to the current system in light of Colorado's rapidly aging population. With CHI's support they produced a set of actionable and data-driven recommendations for improving public and private capacity to address the care and service needs of those affected by Alzheimer's.

#### **Colorado Commission on Affordable Health Care (SB 13-187).**

The legislature created the Commission on Affordable

Health Care to analyze health care costs and make policy recommendations to the state legislature and the governor on strategies for lowering health care costs in the state. CHI was selected to lead the Commission's research and technical work to better understand the drivers of health care costs in our state – and the options to lower them. We worked with the Commission early on to set research agendas and establish priorities and then worked with Commission leadership and other contractors to ensure that the group was staying true to its goals and objectives. CHI has demonstrated our ability to manage competing philosophies and political views by providing a nonpartisan perspective that is informing the discussion.

CHI was also selected by the Colorado Office of Economic Development and International Trade (OEDIT) to create a statewide strategic plan to create jobs and economic growth in the health and wellness industry. We provided both project management and technical support. For this project, CHI organized a listening tour to learn from experts and community members throughout the state. We overlaid those results with technical analysis to provide the Steering Committee with policy options to move the health and wellness industry forward.

## **Budget and Staffing**

CHI is a team-based, collaborative organization that is eager to join the Planning Group in its work.

**Michele Lueck**, CHI's President and CEO, will oversee our managerial work on behalf of the Planning Group. Michele is a dynamic and proven leader. She is an expert on health and health care in Colorado and has established strong relationships across the state. Recognized as a creative thinker who delivers outstanding work, Michele will partner with Amy Downs on strategic thinking and facilitation.

**Amy Downs**, Senior Director for Research and Analysis, will oversee all of CHI's technical work on behalf of the Planning Group. Amy is a recognized health and health policy expert in Colorado with a strong background in providing project management and technical support to groups that make recommendations to the General

Assembly. She speaks widely on demographic shifts in Colorado and how these changes impact public policies. Her interests in health policy include cost containment, Medicaid reform and long-term services and supports. She is skilled in navigating large groups toward actionable policy options. Amy has provided project management and technical analysis to a number of LTSS planning groups, including the Long-Term Care Advisory Committee (SB 05-173), the Long-Term Care Transitions Work Group (HB 07-1374) and the Colorado Alzheimer's Coordinating Council (SB 08-058). She is part of the CHI team providing technical analysis to the Colorado Commission on Affordable Health Care.

Policy Analyst **Natalie Trieman**, who focuses on LTSS, will serve as project assistant. Natalie has managed some of CHI's highest-profile projects. Most recently, she led work on the Colorado Health Access Survey (CHAS), overseeing all aspects of the two-year project — working with key stakeholders to identify policy priorities to include on the CHAS, interpreting data and polishing presentations and reports. Natalie's project management skills are paired with her LTSS content expertise.

They will be supported by a team of project management, research and communications experts.

**Deborah Goeken**, Director of Operations and Communications, leads CHI's team of communications experts. She is known for her ability to manage our large, fast-paced, deadline-driven business. As CHI's primary editor, Deb finds creative and unique ways to present content and information on different platforms. She writes and edits for clarity and flair, with deep understanding of public health and health care policy. She has expertise in presenting complicated material and concepts to a variety of audiences and stakeholders. Deb will oversee and support all communications activities, including meeting minutes, newsletters and final report.

**Sara Schmitt**, Director of Community Health Policy, leads CHI's research in socio-economic factors that affect health and health equity. She developed the framework for the Colorado Health Foundation (CHF) to evaluate its LTSS grant-making strategy and is currently heading up the evaluation of CHF's Colorado Linkage Lab.

**Tim Dunbar**, CHI's Director of Finance and Administration, has decades of business and operations experience, including budgeting, accounting, grant management and office administration. Tim will be available as a resource for the Planning Group to help manage its finances and ensure compliance with all provisions of HB 15-1033. He has worked with state agencies and will partner with the Colorado Department of Local Affairs, as needed.

**Brian Clark**, Manager of Creative Services, is an award-winning graphic designer who will bring life to the design and display of all reports and materials. Brian's contributions will strengthen public relations, improve information sharing strategies and make the Planning Group's work accessible to all audiences.



## Budget

CHI's team will provide 535 hours, at an hourly rate of \$175. Our total budget for project management is \$93,625.

The following page contains a detailed breakdown of activities, hours and responsible staff.

CHI Staff	Hours	Total Cost
Michele Lueck, Project Manager	<ul style="list-style-type: none"> <li>• 20 hours for Planning Group meetings and Executive Committee meetings</li> <li>• 55 hours for strategic thinking around the research questions, goals and objectives</li> </ul>	\$13,125
Amy Downs, Project Manager	<ul style="list-style-type: none"> <li>• 70 hours for Planning Group meetings, Executive Committee meetings and subcommittee meetings</li> <li>• 90 hours for synthesizing and summarizing research, facilitation and report writing</li> </ul>	\$28,000
Natalie Triedman, Project Assistant	<ul style="list-style-type: none"> <li>• 65 hours for Planning Group meetings, Executive Committee meetings and subcommittee meetings</li> <li>• 65 hours for administrative work that includes posting materials to the website, scheduling meetings, managing public relations and writing the newsletter and meeting minutes</li> </ul>	\$22,750
Deborah Goeken	70 hours for writing and editing	\$12,250
Sara Schmitt	40 hours for research and report writing	\$7,000
Brian Clark	40 hours for graphic design	\$7,000
Tim Dunbar	20 hours for business management	\$3,500



## References

### Susan Birch

Executive Director

Colorado Department of Health Care Policy and Financing  
303-866-4167, [Susan.Birch@state.co.us](mailto:Susan.Birch@state.co.us)

- CHI was retained by the Colorado Department of Health Care Policy and Financing to develop and disseminate a three-year strategic plan on the development and evolution of the Regional Care Collaborative Organization (RCCO) model as a vehicle for payment reform and delivery transformation within the Accountable Care Collaborative. We facilitated internal leadership discussions and drafted the proposed plan. We then shared that plan externally with several hundred stakeholders, both in facilitated meetings and one-on-one sessions, gathering input to revise and finalize the plan, which will serve as an essential component of the RCCO rebid process scheduled for next year.

### David Miller

Chief Executive Officer

Denver Foundation  
(303) 300-1790 x104, [Dmiller@denverfoundation.org](mailto:Dmiller@denverfoundation.org)

- CHI developed a comprehensive and actionable assessment of access-to-care challenges faced by Coloradans with high health care needs along with opportunities to address them. A statewide listening tour of diverse stakeholders — paired with rigorous quantitative and qualitative data analysis — advised The Denver Foundation's strategic decisions. This collaborative effort supported development of a new grant-making initiative, the Colorado Health Access Fund.

### Erica Snow

Senior Program Officer: Health Coverage

Colorado Health Foundation

303-953-3656, [esnow@coloradohealth.org](mailto:esnow@coloradohealth.org)

- CHI is evaluating the Colorado Health Foundation's Colorado Linkage Lab, a project to provide technical and business skills to LTSS providers and community-based organizations in Colorado.
- CHI provided analysis in four areas of long-term services and supports to assist in developing a new LTSS strategy. We used evidence-based research and key informant interviews to identify best practices within four LTSS domains. We developed reports in each topic area to help potential grantees understand best practices for the funding priorities.
- CHI conducted a baseline evaluation report for the Colorado Health Foundation to evaluate its LTSS grant-making strategy. We identified existing data sources that measure LTSS system-level performance. We then summarized qualitative and quantitative LTSS indicators, provided an overview of legislative efforts and reported on state agency initiatives. We conducted 19 interviews with consumers, providers, advocates, payers and state leaders with expertise and experience in LTSS, medical health and behavioral health.



## Conflict of Interest

CHI has no conflict of interest.



The Colorado Health Institute is a trusted source of independent and objective health information, data and analysis for the state's health care leaders. The Colorado Health Institute is funded by the Caring for Colorado Foundation, Rose Community Foundation, The Colorado Trust and the Colorado Health Foundation.

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