

# Organizational Restructuring— Aligning Skills With Function

*Running Your Agency: Strategies to Strengthen Systems and People*

---



# About Somerville-Cambridge Elder Services (SCES)

- Since 1972, SCES has helped older people and people living with disabilities remain safe and independent in their own homes by providing a wide range of services and coordination of HCBS and LTSS services and supports
- SCES has a dual designation:
  - Federally is a designated AAA (Area Agency on Aging) covering Somerville and Cambridge
  - A designated ASAP (Aging Service Access Point) in Massachusetts covering state funded home care programs for Somerville and Cambridge (many other programs reach other cities and towns in MA)
- SCES's Community Support Center provides free guidance, resources and advice for people facing challenges of aging, caregiving, and disability and serves as the primary first point of contact for the different programs within the agency

## FY23 Annual Impact

- **8,800+** individuals enrolled
- **230,000+** meals delivered
- **7,831** rides provided
- **1,100+ hours** of volunteer support provided
- **91% would recommend SCES to a friend**

# SCES Core Services

## **Case Management and Care Coordination for LTSS and HCBS services**

**Clinical Assessments and Eligibility Determinations for State Home Care Programs**

**External Case Management and Care Coordination for Managed Care entities (GSSC, LTSC, and others)**

**Complex Case Management for Hospital-to-Home Transitions (H2H Program)**

**Complex Case Management for Nursing Home Transitions (CTLP Program)**

**Screening and Assessment of SDOH needs and closed-loop referrals**

**Nutrition Programs and Registered Dietician Consults (medically and culturally tailored meals)**

**Chronic Disease Self-Management Programs**

**Resident Supportive Services for Supportive and Congregate Housing**

## **Behavioral Health Services**

**Family Caregiver Support Program**

**Dementia Care Programming**

**Options Counseling**

**Housing Navigation and Eviction Prevention**

**Protective services**

**Adult Foster Care (AFC)**

**Money Management Programs**

**Senior Community Service Employment Program (SCSEP)**

**Serving the Health Information Needs of Elders (SHINE)**

**Benefits Support Specialists (Certified Application Counselors (CAC))**

**Transportation Coordination (for health or social-related activities)**

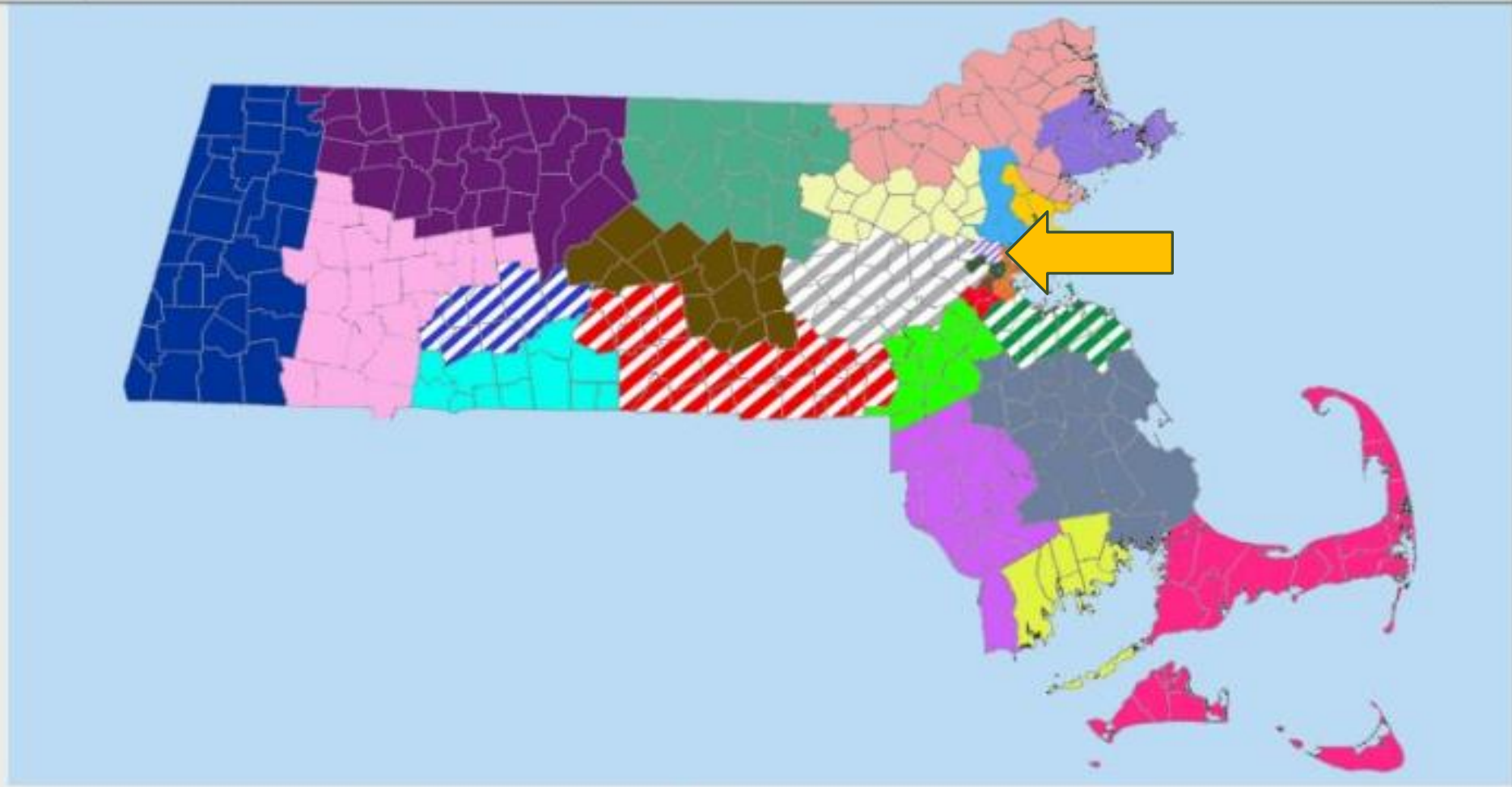
**Wellness and Social Programs**

# AGING SERVICES ACCESS POINTS (ASAPs) IN MASSACHUSETTS

Call MassOptions at 800-243-4636 to connect with your local ASAP

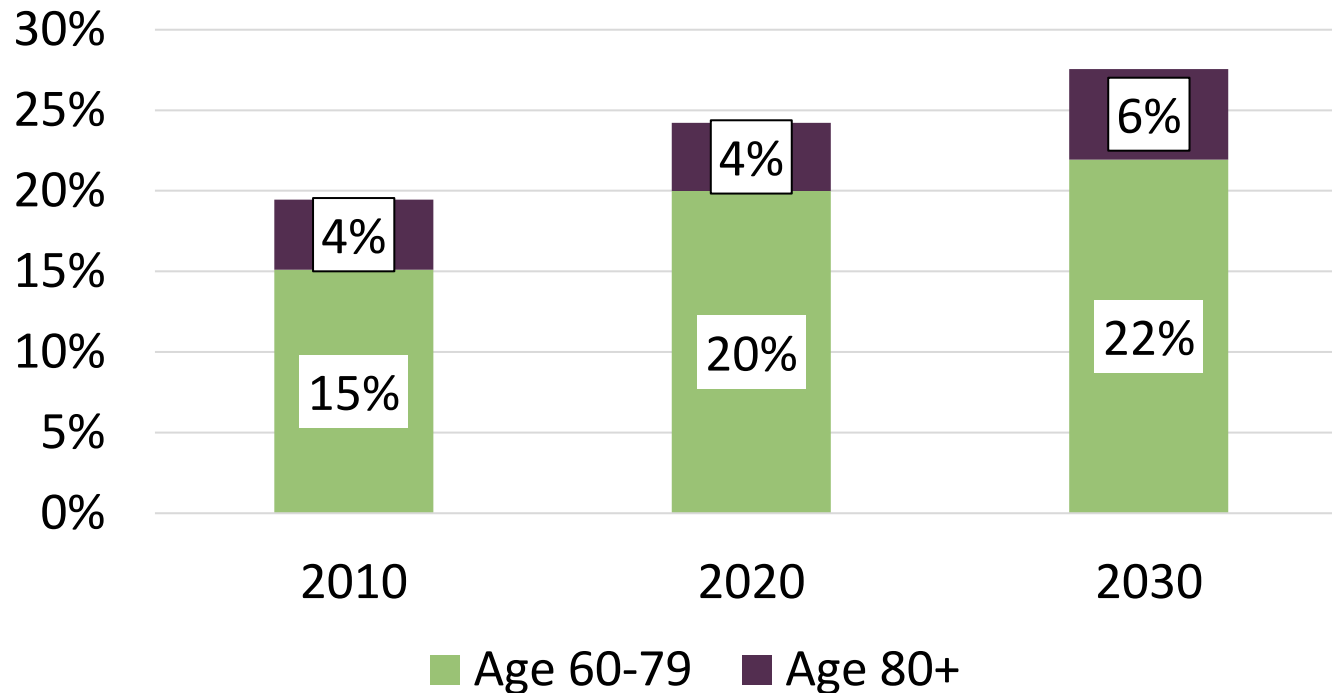
- AgeSpan
- Aging Services of North Central Massachusetts
- Boston Senior Home Care
- Bristol Elder Services, Inc.
- Central Boston Elder Services
- Coastline Elderly Services, Inc.
- Elder Services of Berkshire County, Inc.
- Elder Services of Cape Cod and the Islands, Inc.
- Elder Services of Worcester Area, Inc.
- ETHOS
- Greater Lynn Senior Services, Inc.
- Greater Springfield Senior Services, Inc.
- HESSCO Elder Services
- Highland Valley Elder Services, Inc.
- LifePath, Inc.
- Minuteman Senior Services

- Mystic Valley Elder Services, Inc.
- SeniorCare, Inc.
- South Shore Elder Services, Inc.
- Tri-Valley, Inc.
- Old Colony Elder Services, Inc.
- Somerville/Cambridge Elder Services, Inc.
- Springwell, Inc.
- WestMass Elder Care, Inc.



# Aging in Massachusetts

## Older adults continue to comprise a sizable share of MA's population

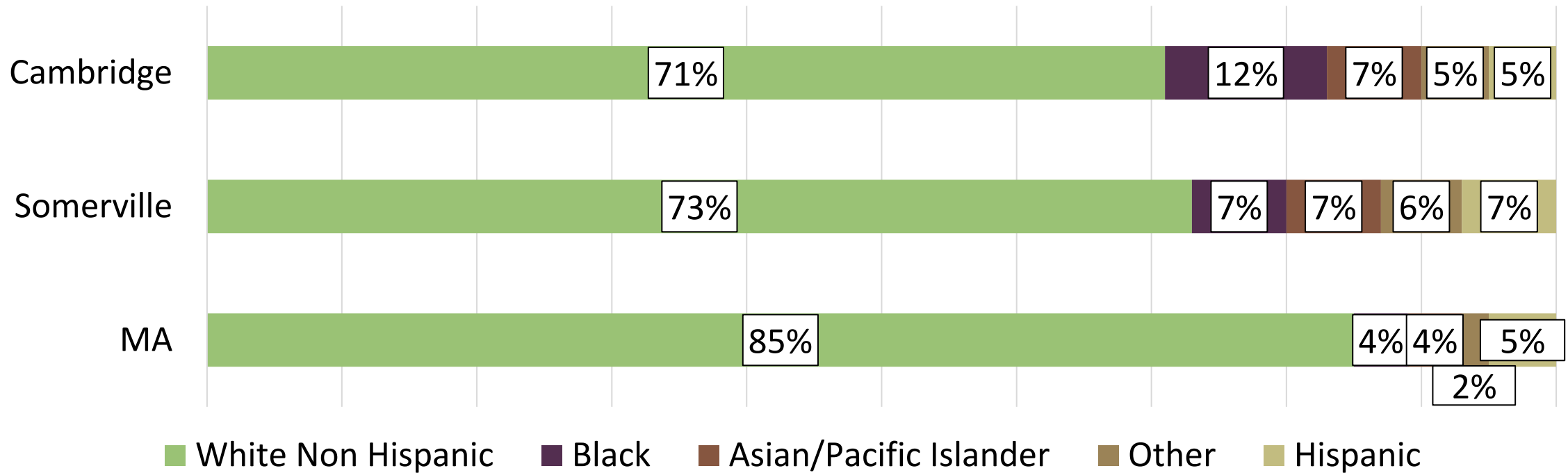


- Significant shifts happening in the Greater Boston area
  - Housing crisis
  - Rising cost of living
  - Older Adult Mental Health Needs
  - Increased for-profit competition in the aging services space
- As the older adult population grows, people are accessing services differently
  - SCES must pivot to adapt to changing needs

Source: Center for Social & Demographic Research on Aging, Gerontology Institute, University of Massachusetts Boston

# Aging in Somerville and Cambridge

## Older residents of Cambridge/Somerville are more ethnically diverse than MA



Source: Center for Social & Demographic Research on Aging, Gerontology Institute, University of Massachusetts Boston

# SCES Consumer and Employee Statistics

## SCES Consumers

**8,000+ consumers**

**Average age – 78 years**

### Languages

English 63%

Spanish 9%

Haitian Creole 7%

Portuguese 5%

Chinese – Mandarin 4%

Other 12%

### Race

White 61%

Hispanic 2%

Black 21%

Asian 5%

Other 11%

## SCES Employees

**144 Staff**

**330+ Volunteers**

**16 languages spoken (including ASL)**

**11% identify as older adults**

**51% identify as White**

**20% identify as Black**

**15% identify as Hispanic/Latinx**

**11% identify as Asian**

**3% - other**

# How it Started - SCES CEO Search

## **SCES Board of Directors engaged with a recruiting firm in 2021 to begin SCES's next CEO search:**

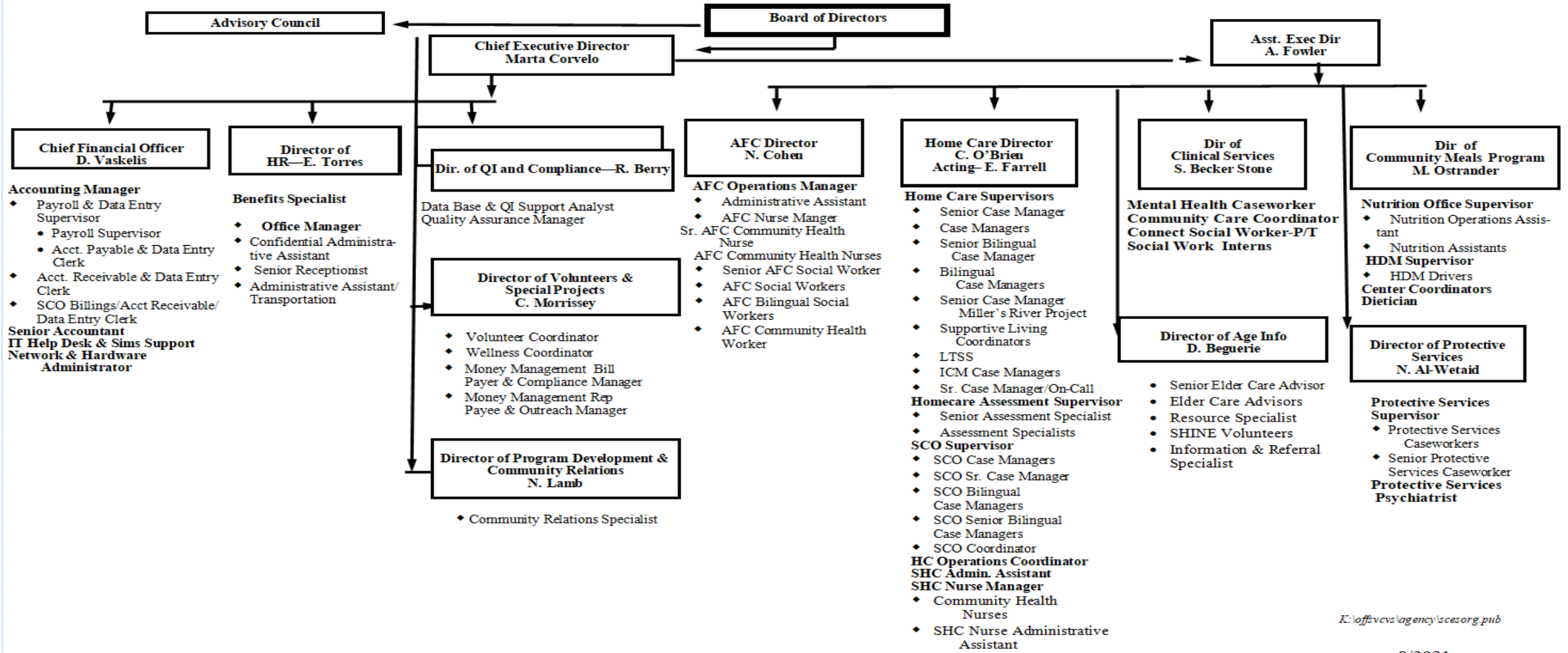
- Last Executive Director with the agency for four years before retiring
- The Executive Director before that was with the agency for forty years
- BOD sought to hire a CEO with a diverse background, representative of the communities served, and with extensive experience in healthcare, value-based contracting, and community-based work
- Marta Corvelo onboarded as the new CEO in May 2022 having spend 20+ years in different healthcare and community based settings

## **SCES Board of Directors charging orders:**

- Prioritize DEI and Health Equity across all levels of the organization
- Conduct a risk assessment and identify areas of opportunity that can position the organization for continued growth and diversification of funding streams
- Develop career pathways so that everyone has an opportunity to participate in the agency's leadership
- Develop a diverse and knowledge-based workforce that is well equipped to adapt and tackle the eve-changing industry challenges



# Somerville-Cambridge Elder Services – ORGANIZATIONAL CHART



# Phase 1 (month 1-6)

## Initial Stakeholder Interviews

- Staff, BOD, SCES Leaders

## Staff Engagement Activities

- Shadowing of work
- Town Halls
- Stakeholder Interviews
- Opportunities for in-office socialization

## Leadership Retreat

- Baseline SWOT analysis
- Development of a leadership culture code

## Meeting Alignment

- Monthly All Hands Meeting
- Quarterly Combined meeting
- Bi-weekly Senior Leadership Meeting

## External stakeholder engagement

- CEO community outreach
- Client Journey mapping project

## Final Six-Month Assessment

- Leadership Analysis
- Risk Assessment
- Threats
- Areas of Development
- Areas of Opportunity
- 12-month roadmap

# Meeting Structure Alignment

---

- **Monthly All Hands Meeting**
- **Bi-weekly Senior Leadership Meetings**
- **Monthly Action Team Meetings**
- **Monthly Departmental Meetings**
- **Monthly Community Engagement Meetings**
- **Quarterly Combined Leadership Meetings**

# Phase 2 (month 7-12)

## CEO Annual Goal Implementation

- Broken down into departmental goals
- Focused on shoring up the SCES infrastructure

## Stakeholder Engagement

- Town halls
- Action team meetings
- Leadership Development Activities

## Beginning stages of staff re-alignment of functions

- Created new career pathways
- Developed leadership competencies
- Developed new positions based on identified gaps
- Engaged staff in the process

## Full revamp of SCES's HR infrastructure

- New Handbook
- Development of 40+ new policies and procedures
- Leadership coaching and training

## IT infrastructure Enhancements

- Microsoft 365 upgrades – instituted an intranet
- Project Management software
- Business Intelligence platform (beginning stages)
- Began the procurement process for a new phone system
- Began the procurement process for a Researched new finance system

# Career Pathway Development



# SCES Leadership Competency Matrix

Role	1. Strategic Orientation	2. Community Impact	3. Market Knowledge	4. Financial Accountability	5. Results Orientation	6. Change Leadership	7. Collaboration and Influence	8. People and Organizational Development	9. Team Leadership
<b>Senior Leader</b>	Plays a major role in developing the strategic plan that integrates multiple business issues, functions and resources for quality and productivity improvement.	Has a high-impact relationships with key external agencies, with ability to envision and advocate mutually beneficial partnerships.	Anticipates, capitalizes on and drives changes in the local market. Ensures SCES is an industry leader in best practices.	Collaborates with other senior leaders to implement new strategies to increase revenue and contain cost. Maintains budget accountability.	Transforms agency's processes for significantly improved results across organizational functional areas.	Creates significant coordinated change across the entire organization.	Creates innovative partnerships that span the agency and beyond.	Creates and implements development plans to systemically improve and retain talent across the agency. Makes staff development a priority.	Develops a high-performing team. Established metrics to achieve goals and process improvement.
<b>Department Leader</b>	Plays a major role in implementing the strategic plan that integrates numerous business issues, functions and resources for effective action.	Cultivates relationships with community agencies, supporting strategies to develop mutually beneficial relationships.	Anticipates, capitalizes on and assists in driving changes in the local market.	Develops and implements strategies to improve revenue and contain costs. Has budgetary oversight over a department and/or functional area.	Introduces improvements, allowing higher goals to be set.	Proactively challenges the status quo and points out what needs to be changed while mobilizing individuals or groups to change.	Creates partnerships and collaborative endeavors within their department and between other departments.	Influences development of talent systemically within areas of influence for a broader impact on the organization's capabilities.	Empowers and strengthens the team, delegating authority with the intent of enabling the team to work effectively without direct management.
<b>Frontline Manager/ Supervisor</b>	Responsible for achieving the objectives of one's functional area.	Understands agencies within the community, how they relate to the agency and uses this knowledge to anticipate future needs.	Knows the market well enough to spot trends and works with department leader to implement change.	Understands the financial goals of the organization and understands the impact their decisions make on the attainment of that goal. Responsible for achieving results within functional areas.	Responsible for implementing functional area process improvement.	Proactively challenges the status quo and points out what needs to be changed.	Is a genuine team player and effectively influences others to achieve results.	Provides individual feedback and guidance for development of individuals within a functional area.	Actively engages the team to manage and drive performance.

**Team Leader**

**Receives the training and coaching to eventually participate in the agency's leadership. Serves as a resource, preceptor and a liaison for the team.**

# Developing SCES's Future Leaders

**Donte' Brown**  
Manager  
Training and Workforce Development



**Vanessa Laroche**  
Team Leader  
Protective Services



**Viet Van**  
Manager  
Community Support Services



**Giovannie Bertrand**  
Team Leader  
Community Support Services



**Jeremy Bratt**  
Manager  
Volunteer and Grant Programs



**TBD**  
Team Leader  
Home Care and Housing Programs



**Colleen Morrissey**  
Director  
Operations and Community Support



**Allison Alaimo**  
AFC Social Work Manager  
Home Care



**Amartya Saha**  
Finance Controller



**Annie Fowler**  
Chief Programs Officer



# Phase 3 (month 13 -24)





# Continuous centering of the work on the Mission and Vision

## VISION

SCES is the model ASAP in Massachusetts. We will create communities where all adults have the resources, information, and support to live and age with dignity.

## MISSION

SCES promotes the right of all individuals to live with dignity in the setting of their choice by offering older people, people with disabilities, and caregivers the information, services, and support needed to make choices that enhance health, well-being, and independence.



# Re-alignment of Core Leadership Competencies

## **Vision**

A leader with a clear vision for the future can inspire and guide their team towards a common goal.

---

## **Communication**

Leaders must clearly and consistently communicate expectations and the organization's cultural norms to their team members. They do not shy away from difficult conversations when those expectations aren't met. Their e-mail communication is respectful and clear (i.e. use the subject line in emails – be specific about the topic, find out the best way to communicate with your team when not in person).

## **Motivation**

Leaders motivate their team members to do great work, connect them to the purpose, and hold their teams accountable to meet the organization's mission. They understand the significance of their impact as they participate in the agency's leadership and help grow new leaders.

## **Unity**

Leaders unite their team members with a shared sense of purpose to achieve the vision. They provide feedback to people who report to them and respond in a timely manner when people ask for your input, advice, information, or guidance. They lead by example and face challenges head-on while bringing people together.

## **Curiosity**

Leaders are always learning new things, which makes them more informed and well-rounded. It increases their intelligence, creativity, and problem-solving abilities and supports your efforts to stay current, connected, and innovative. They identify trends and dig deeper to identify issues and to course-correct.

## **Commitment**

Leaders invest in resources that build diversity and inclusion and prioritize fairness and respect. They track and take personal responsibility for inclusive effort outcomes.

# SCES'S CORE VALUES

<b>POSITIVE</b>	<ul style="list-style-type: none"><li>• I encourage and support my co-workers.</li><li>• I speak about my coworkers and the agency in a way that inspires trust.</li><li>• I am warm, welcoming, and flexible.</li><li>• I bring passion, energy, and optimism to the workplace.</li></ul>	<p>Embrace change, change is inevitable.</p> <p>Representing our agency in a positive light to all constituents, including those who report to you. Because you are a leader, you have the added responsibility to guide your team during times of change and in the face of new initiatives that are not yet fully formed. This can be difficult, but your team looks to you, and your messages to them, both direct and implied, matter.</p> <p>Organizations that don't change will stagnate and stagnation means fewer clients will be helped, less funding will be available to us, and fewer employees will be needed to run SCES. It's on all of us to adapt, embrace change, and continue to improve.</p>
<b>COMPASSIONATE</b>	<ul style="list-style-type: none"><li>• I show care and respect for clients and co-workers</li><li>• I show kindness and graciousness towards others.</li><li>• I listen with full attention and with patience.</li></ul>	<p>Ensure that processes and workflows are conducive to a person-centered approach. If someone from another department reaches out to you to ask you to be timelier in updating a client's information because this affects their workflow. The result can be that a client who is deceased continues to receive mail. Show respect for your co-worker by honoring their request.</p> <p>Be an active listener which means do not listen to respond but listen to understand. Show grace when receiving constructive feedback, but also provide feedback to your team with kindness and grace (firm but kind, sticking to the "facts" not the "person").</p>
<b>INCLUSIVE</b>	<ul style="list-style-type: none"><li>• I appreciate the different experiences and perspectives that each person brings.</li><li>• I bring awareness to my assumptions and biases and actively work on changing them.</li><li>• I seek and value input from clients, community organizations, and my co-workers.</li></ul>	<p>You and a direct report may have a very different approach and communication style. It is important to both respect their perspective and let them know it is valued, but also to be clear about what needs to be accomplished.</p>

# SCES'S CORE VALUES

## COLLABORATIVE

- I welcome feedback.
- I speak up when I have something to add or ask.
- I go directly to my co-workers in times of conflict in a spirit of reconciliation.
- I strive to meet and understand the needs of others.

Be willing to help others, even if beyond the traditional scope of your work. Put the needs of our clients at the forefront of all you do when leading your teams.

The best form of collaboration is in holding your team accountable to do their work, to do it well, and timely. For every action, there's an equal or opposite reaction, and each department must rely on each other to produce quality work.

Check your work – errors you miss will be carried down the line – to payroll, to someone's paycheck, to the delivery of care to our clients. Instill this with your staff.

Be willing to have difficult conversations with your peers when your department's work is impacted by others' errors or delays.

## RELIABLE

- I make and keep commitments.
- I keep others well informed.
- I take ownership of issues and follow through to resolution.

Leave each meeting with a clear understanding of the next action steps, and deadlines, and if you are assigned a task, assume responsibility for it and complete it. Also, hold your team accountable for this.

Be the leader others can count on, and if another department brings issues to your attention, investigate it, address it with staff, and follow up with the person who initially brought it to your attention - be the person others count on.

Ensure that your team and peers are well informed of relevant information and updates impacting their work. It is important for information to flow to them.

Do not make excuses for an employee who is underperforming and not meeting the expectations of the job. For instance, documentation delays significantly impact other departments and the care we provide to our clients! Address the issue and patterns head-on!

We embrace mistakes but do not embrace cover-ups! Admit mistakes and don't hide them. It helps others to do the same and we can all learn from them.

## RESPONSIVE

- I appreciate the different experiences and perspectives that each person brings.
- I bring awareness to my assumptions and biases and actively work on changing them.
- I seek and value input from clients, community organizations, and my co-workers.

Examine your role in how you can participate in this evolution. What methods, work processes and approaches can you bring to the table? Look with fresh eyes upon old processes to see if there's a way to improve them. Show curiosity and dig into issues and patterns to learn more about the core issues and how to resolve them. Be an outside-the-box thinker – just because it has always been done the same way, it doesn't mean we shouldn't do it differently and more efficiently.

Get back to people. If you receive an email and don't have an answer to a question let them know that and then get back to them after you do. Not hearing back from people when you leave a message makes people feel that they aren't valued.

Follow up. Summarize the next steps at the end of meetings so that everyone understands their tasks and what happens next.

# DEVELOPING AN UPDATED SWOT ANALYSIS

## Strengths

- What does SCES currently do well?
- What separates us from our competitors?
- What is SCES's biggest strength?

## Weaknesses

- What does SCES do poorly?
- What does SCES currently lack (product, resource, or process)?
- What do our competitors do better than us?
- What processes or programs need improvement?
- What limitations are holding SCES back?

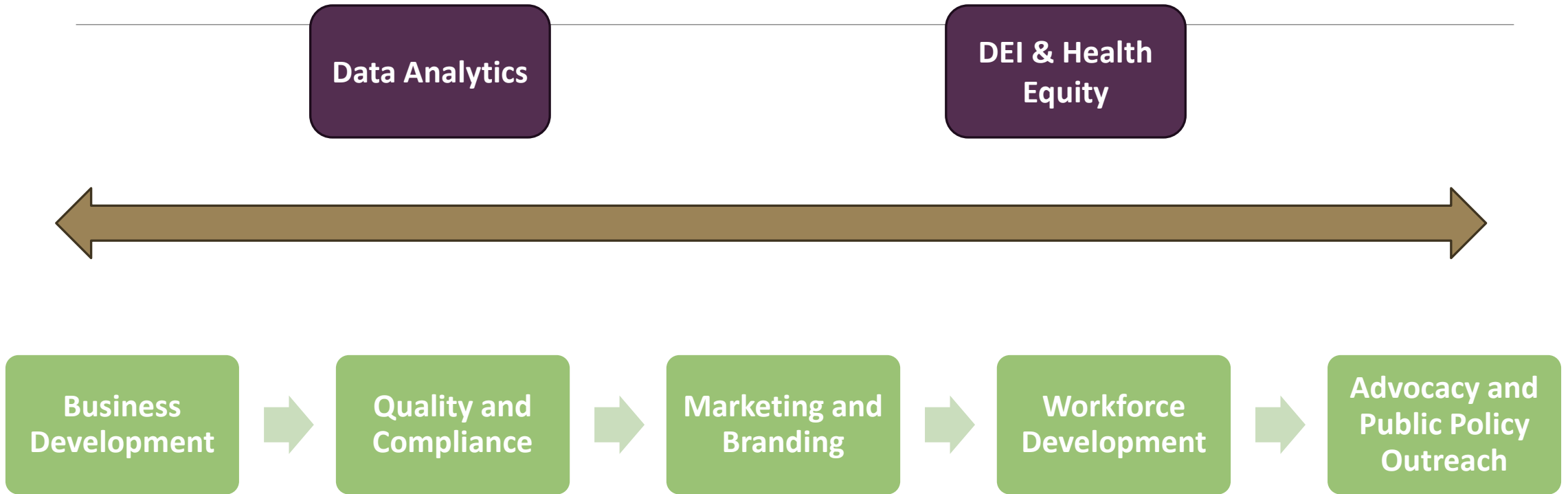
## Opportunities

- What opportunities does SCES have?
- How can we leverage our unique company strength?
- What trends can SCES take advantage of?
- How can SCES capitalize on marketing or press opportunities?
- Is there an emerging need for our products or services?

## Threats

- What emerging competitors should SCES keep an eye on?
- Are there any weaknesses that expose our organization to risk?
- Has SCES/ASAP network experienced any negative press that could reduce market share and influence?
- Is there a changing consumer attitude towards ASAP or our services?

# Strategic Planning Pillars



# STRATEGIC GOAL SETTING

Tie in SMART goals to the overall vision and mission of the organization.

---

<b>S</b>	<b>Specific</b>	Make your goal specific and narrow for more effective planning
<b>M</b>	<b>Measurable</b>	Make sure your goal and progress are measurable
<b>A</b>	<b>Achievable</b>	Make sure you can reasonably accomplish your goal within a certain time frame
<b>R</b>	<b>Relevant</b>	Your goal should align with your values and long-term objectives
<b>T</b>	<b>Time-based</b>	Set a realistic but ambitious end date to clarify task prioritization and increase motivation

# Example of SMART Strategic Goals

**SCES will boost employee retention for the next 18 months by providing more opportunities for professional growth, implementing a fair and transparent promotion process, and creating a positive work environment.**

**Specific:** The actions taken are providing professional opportunities, implementing a fair promotion process, and fostering a positive workplace.

**Measurable:** Reduction in employee turnover rate can be determined. Employee satisfaction can also be tracked through surveys.

**Attainable:** As long as the company is willing to implement these changes, they are possible.

**Relevant:** This goal promotes a positive work environment and improves employee retention.

**Time-based:** The actions should be implemented over three years.



# SCES Senior Leadership Team

## Senior Leadership



**Marta Corvelo**  
Chief Executive Officer



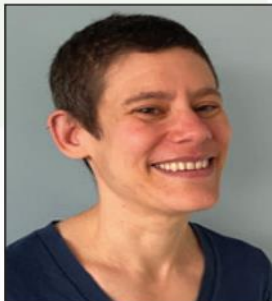
**Annie Fowler**  
Chief Program Officer



**Donna Vaskelis**  
Chief Financial Officer



**Colleen Morrissey**  
Chief External Affairs  
Officer



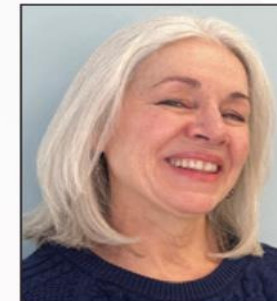
**Rachel Berry**  
Chief Quality &  
Compliance Officer



**Andrew Blanchette**  
Director of Operations



**Meghan Ostrander**  
Director of Nutrition &  
Community Programs



**Ellyn Torres**  
Director of Culture &  
People Operations

# SCES Management Team



**Keith Adams**  
Protective Services  
Director



**Jeremy Bratt**  
Director of Area Planning  
& Development



**Nina Cohen**  
Adult Family Care  
Director



**Amartya Saha**  
Controller



**Alaudia Ramos**  
Home Care &  
SCO Supervisor



**Carolyn O'Brien**  
Director of Home  
Care



**Alison Alaimo**  
Adult Family Care  
Social Work Manager



**Donte' Brown**  
Training & Workforce  
Development Manager



**Jennifer Etienne**  
Home Care Nurse  
Manager



**Courtney Johnson**  
Clinical Integration  
Manager



**Monicah Marsh**  
Adult Family Care  
Nurse Manager



**Rosemary Nalumansi**  
Quality Assurance  
Manager



**Andrea Svartstrom**  
Dietitian/Community  
Meal Site Manager



**Viet Van**  
Community Support  
Center Manager



**Shamone Allen**  
Assessment Supervisor



**Amanda O'Brien**  
SCO Supervisor



**Tony Huang**  
Home Care  
Supervisor



**Helia Kinney**  
Nutrition Office  
Supervisor



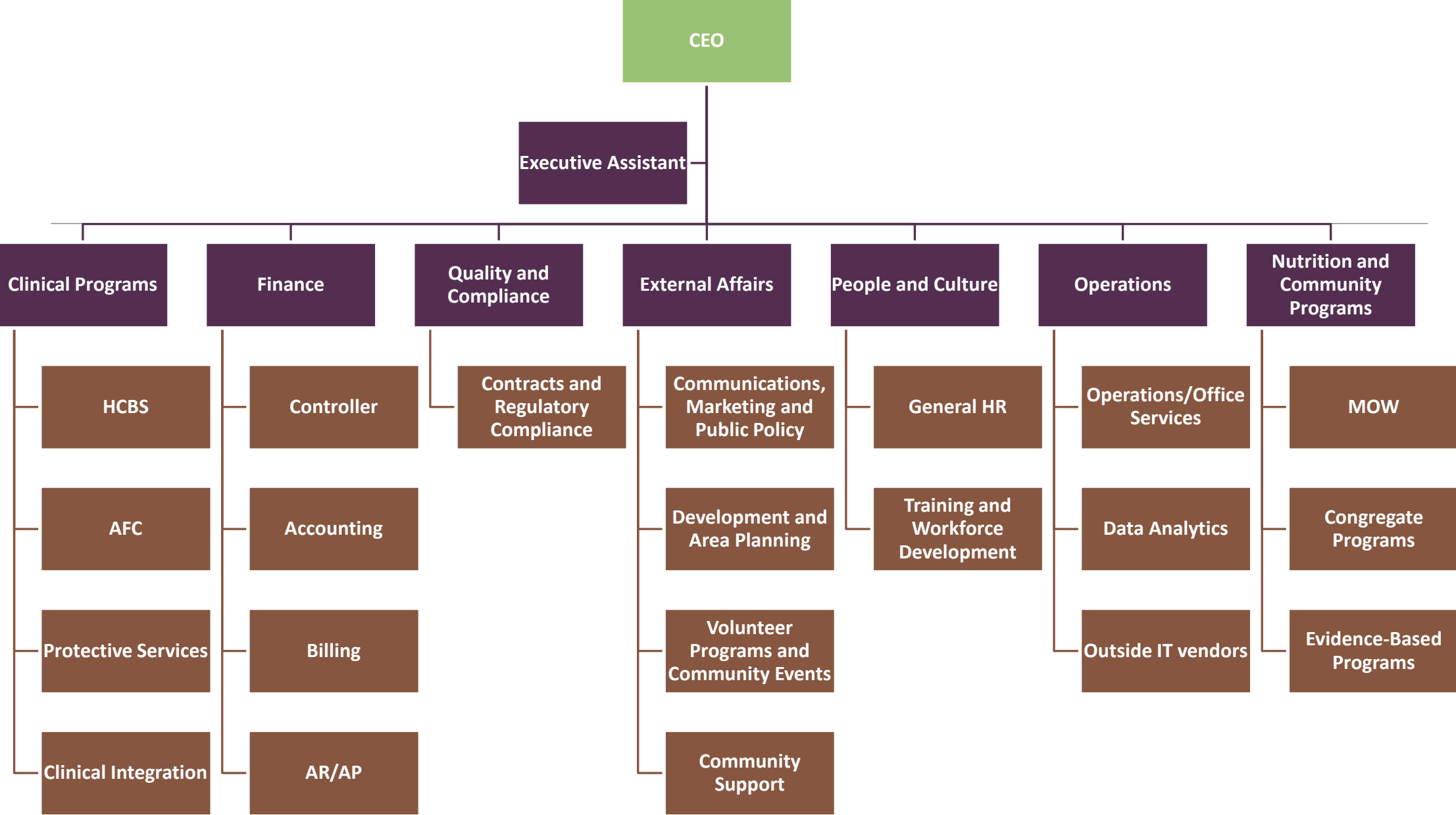
**Ka Wo Lam**  
Protective Services  
Supervisor



**Milagro Mancia**  
Meals on Wheels  
Supervisor

# Departmental Successes

- **Human Resources**
  - New policies, procedures, handbooks, job descriptions
  - Promotes consistency and accountability across the agency
  - Salary benchmarks
- **Protective Services**
  - Intake changes
  - New team leader
- **Operations**
  - Implemented new phone system
  - Increased cyber security
  - Improved technology
  - Performs ongoing risk assessment
  - Improved onsite and offsite operations and tech support
- **Community Support Center**
  - Improves experience for community members
- **Finance**
  - New finance system
  - Budget and financial training for leadership
  - Highly interactive budget planning process
  - Improved reports
  -
- **External Affairs**
  - Manages relationships with stakeholders
  - Performs advocacy and fundraising
  - Increased SCES's visibility
- **New HCBS Department 2024!**
  - Alignment with contract and regulatory requirements
  - Re-aligned functional areas
- **Clinical Integration Department**
  - Coming Fall 2024!!!



# Reflections

---

**Change Management IS Management!!**

**Board engagement and support is key!**

**Fist six months listening and learning and change had to come quickly which was difficult for staff.**

**Investment in new positions and departments entailed reimagining roles and taking the time to explain the need for the role changes is critical!**

**Helping staff work with the budget/financial literacy helped them better understand how SCES runs and how to become better advocates of our work.**

**Leadership development helped get buy-in from staff across all levels.**

**Cultural shift is still an evolving process...At times it is difficult to prioritize work – SCES is a leaner and smaller organization.**

# Our Contact Information



**Marta Corvelo**  
Chief Executive Officer  
[marta.corvelo@eldercare.org](mailto:marta.corvelo@eldercare.org)



**Annie Fowler**  
Chief Programs Officer  
[annie.fowler@eldercare.org](mailto:annie.fowler@eldercare.org)