

Sample: Quarterly Progress Report For Provider Leadership Wowing Regulatory, MCO & Accreditation Overseers



As we do on a routine basis, we've been reaching out to your staff over the past few weeks to make sure we address organizational goals and the needs and choices of people supported. We very much appreciate the time and dedication of your staff to establish this communication and build our relationship; it's the primary way we are able, together, to accomplish the most beneficial health, quality and financial outcomes.

Here is a brief, general summary of our recent efforts and exchanges. Please let me know at any time if you would like to talk further about this information or anything in general. We greatly appreciate the opportunity to partner with you. Thank you.

Date:	8/4/16
Organization:	Your Org Name Here
Overview Completed By:	Ben Hearn
My Email:	ben@my25.com
My Phone:	443-834-5106

Good News

- Since start up of My25, individuals in several houses have made tremendous strides in moving toward a healthy BMI. For example:
 - In your Holden house, resident TJ lost 22 pounds. This was a reduction from an overweight BMI of 29.4 to a healthy BMI of 25.
 - In the Casey house, residents LC and BT lost 18 pounds and 26 pounds, respectively. Also in this house, resident JM moved from an obese BMI of 29 down to a normal BMI level of 26.7.
- In the Tobler house, the lead house manager explained that My25 Choice menus have been an instrumental component in curbing certain negative mealtime behaviors for her 5 residents and are a guidepost for her staff, while also reducing grocery expense by about 11%. She called My25, "win-win."
- Meanwhile, the house manager from the Ashland house articulated that My25 menus have helped encourage residents to eat the house meals instead of seeking out fast food—and this has resulted in increased enjoyment surrounding home-cooked mealtime.
 - The house manager told us that staff members previously had a tough time convincing some of their residents to eat home-cooked meals.

Settings We Connected With

Holden | Casey | Ashland | Kitchell | Dwyer Rd. | Flank | Sunset Dr. | Maple | Davenport | Loring | Tivoli | Whiting | Cornish | Woodlawn | Streeterville

Settings We Couldn't Connect With, But Tried!

None! – We were able to connect with all of your waivers and ICFs that have so far started the program. We look forward to another 12 settings starting next month—thank you!

My25 programs are currently utilized by both national and regional providers in 29 states, so we have a lot of experience with, and exposure to, the preventive health and cost reduction mindset throughout the industry; we are impressed with you!



Changes We're Making Based On Our Conversations

To reflect choice, budget, dietary, and general health needs, we made numerous menu changes—some upon request and some at our suggestion as we kept watch on health trends and grocery expense—within all of the houses we connected with. I'd like to highlight two houses in particular, so you get an idea of the kinds of menu changes we are pleased to make at any time in order to facilitate any and all of these important goals. No two settings have the same menus as you have seen.

After speaking with the house manager from the Cornish house, we made the following changes to further customize their specific menus (which we do for the individual consumer to reflect food preferences and dietary needs) and for each setting (to reflect important weekly routines such as pizza night every Frida) and to drive improving health:

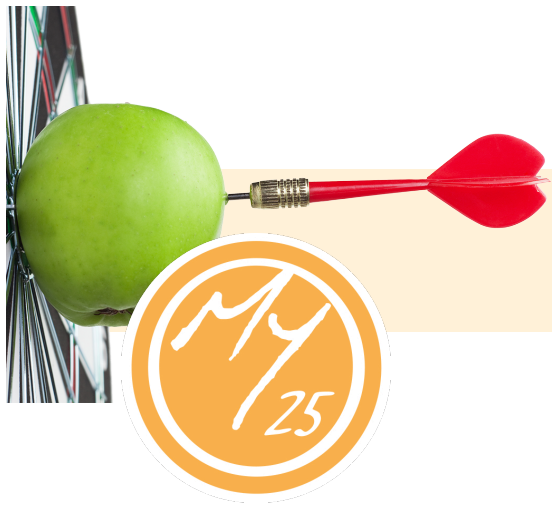
- We noted that 4 out of the 7 residents were in overweight BMI ranges, so we asked the house manager for updated caloric intake information for the residents.
- Upon receiving the current calorie information for the Cornish residents, we adjusted the Cornish Therapeutic Report. The Therapeutic Report, specific to each setting, helps staff provide appropriate serving sizes to consumers at mealtime, so the right foods in the right amounts are available with consistency and accuracy. The key to success is staff following the Therapeutic Report on a daily basis. If additional training is necessary regarding how to use the Therapeutic Report, we are happy to provide this education/in-service at any time. Additionally, we have a brief overview hand-out regarding use of the Therapeutic Report that we are attaching here.

In the Tivoli house, there were 3 specific menu change requests that are being addressed immediately by our menu team; one request (3rd bullet point below) requires your final approval due to our estimation of increased grocery expense.

- For breakfast, we will replace CM's Instant Carnation with another high caloric beverage.
- Our menu team is further customizing the Tivoli house breakfast menu by reflecting that FD drinks whole milk, while SF & KK drink skim milk.
- Upon approval for a potential increase in your grocery expense, we will replace frozen spinach with fresh spinach. Please note that frozen spinach is less expensive and has similar nutritional value, but we're happy to make the change, if you like.



My25 OVERVIEW REPORT



Additional ...

- The house manager from the Maple house explained that staff members require additional help redirecting consumers toward healthier mealtime choices, especially when it comes to leftovers. Portion control overall seems to be an issue as well. So we provided the house manager with an overview refresher for how to use My25's Therapeutic Report; we further offered to hop on the phone to answer specific questions. My25's Therapeutic Report provides staff members with directions for accurate serving sizes based on each resident's recommended caloric intake. I'm also attaching our document titled, "Tips For When Consumers Refuse to Eat My25 and /or Eat Better In General," which I have also sent to the Maple house manager.
- After speaking with the house manager at Ashland, we learned that My25 dinner menus are enthusiastically embraced, but that breakfast and lunch menus are not yet actively utilized here. The house manager explained that Ashland's 4 residents prepare breakfast meals on their own without staff guidance. The BMI levels for two of the four residents are in morbidly obese ranges. We certainly respect choice for people supported, but we believe that we can be helpful regarding getting consumers more in line with responsible choice, so their poor health status and quality of life improve. I'm attaching our document titled, "When Consumer Health Is Moving In The Wrong Direction," which in tandem with the overview noted above ("Tips For When Consumers Refuse To Eat . . ."), can be helpful to Ashland. We are happy to engage with staff and consumers at Ashland at any time to be helpful.
- We are committed to helping your settings control grocery expenses. In most agencies we are able to reduce purchases by 10 to 20%. We have even seen grocery cost reduce by as much as 30 to 40% in many waivers and ICFs. This is possible when My25's choice-based menus are followed and staff is held accountable.
- We continue to be wildly committed to improving health—including those who need to lose weight and those who need to gain weight—for the people you support, and we applaud your dedication to the same goal. Based on feedback your staff provides, we are able to adjust menus and work with staff to accomplish outcomes related to BMI, A1C levels, blood pressure readings, and more. As more time elapses, and we are able to secure updates to resident weights from you, we will provide health trending analysis for you and proceed proactively regarding menu changes and other forms of education, training and support we available to you.
- We've thoroughly enjoyed interacting with all of your house managers. We look forward to our continued relationship, and we hope that managers and DSPs feel comfortable reaching out to us whenever there are dietary concerns/needs (such as for diabetes, GERD, lactose intolerance, dysphagia, allergies, ESRD, and more) or menu change requests. Menu change requests, which we never charge for additionally, ensure that mealtime is based on resident food likes/dislikes—choice—and their needs.



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