

# Organizational and Leadership Structure

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# Presenters



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# Learning Objectives

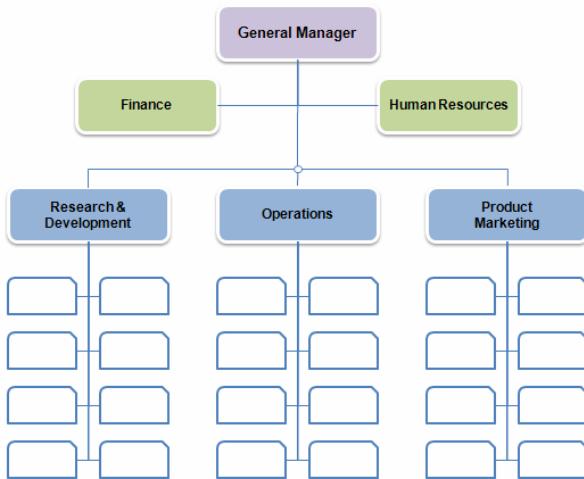


- Understand the development of a management structure within a large and well-established PACE program with multiple PACE centers.
- Become familiar with the various leadership models/options.
- Improve the management structure to support the growth and changes within a PACE organization due to the economic environmental changes, demands of the clientele, as well as organizational and administrative designs.

# What is an organizational and leadership structure/framework?



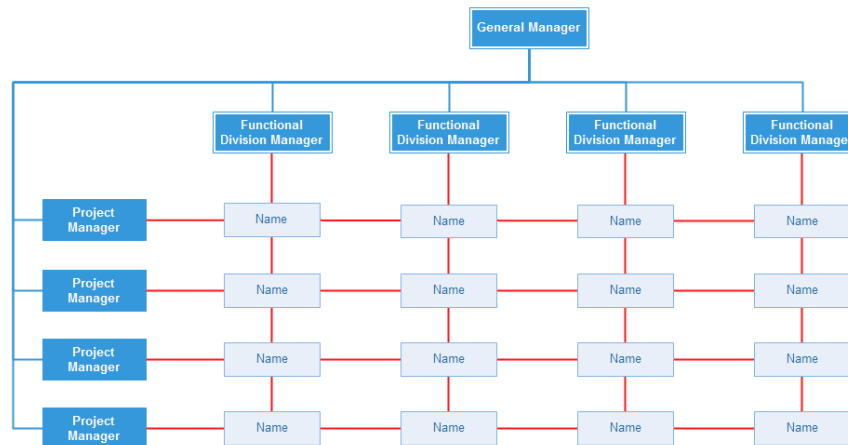
Functional Organizational Structure



Flat Organization Structure



Matrix Org Chart Template



# Organizational structure



“The typically hierarchical arrangement of lines of authority, communications, rights and duties of an organization. Organizational structure determines how the roles, power and responsibilities are assigned, controlled, and coordinated, and how information flows between the different levels of management.”

Read more:

<http://www.businessdictionary.com/definition/organizational-structure.html>



# Leadership structure/framework



“Organisations use leadership frameworks to articulate what is expected of their leaders in order to drive business success. We believe that in order to be meaningful, such frameworks need to be reflective of the organisation’s cultural DNA and give people a clear sense of how they can achieve its strategic goals. The benefit of having such models in place is that they provide clarity, consistency and a common language for identifying, assessing and developing leaders – helping them progress through the organisation. They can be used to reinforce the current culture or embed change during a period of transition.”

Read more: <http://www.ysc.com/what-we-do/organisational-development/leadership-frameworks>



# Who are we?



## Original Vision:

- ❖ Help the low-income seniors in Chinatown/North Beach area of San Francisco stay in their own homes
- ❖ National prototype for the Program of All-inclusive Care for the Elderly (PACE) model of care

## Today:

- ❖ We are 46 years old
- ❖ On Lok Lifeways, our PACE program, serves over 1,400 seniors in three San Francisco Bay Area counties
- ❖ We have six PACE centers, 10 interdisciplinary teams, and four alternative care settings
- ❖ On Lok's 30<sup>th</sup> Senior Center services over 5,000 seniors annually with traditional senior center services
- ❖ Owns and operates three senior housing buildings

# On Lok Lifeways: Our Story



- Served the Chinatown/North Beach neighborhoods of San Francisco from 1973 to 1995 with four PACE centers
- Expanded PACE throughout San Francisco in 1996 with sub-contract with Institute on Aging (IOA) and acquisition of 30th Street Senior Services
- Obtained a Knox-Keene license in 1999, the only PACE program to have done so in California
- In 2002, expanded to the City of Fremont, east of San Francisco, using the community physician model to serve the new county of Alameda
- Became a permanent PACE provider under Medicare and Medi-Cal in 2003
- Expanded to City of San Jose, south of San Francisco, to serve Santa Clara County in 2009
- Opened a second PACE center in the City of Fremont developed in partnership with Eden Housing in 2012
- Opened the East San Jose ADHC center in 2014 to serve as alternative care setting to San Jose PACE center.
- Expanding the East San Jose ADHC center to a full PACE Center in 2017
- Grown to over 900 staff and with only a few transitions in leadership up until 2016
- In 2016, transitioned to a new CEO with a rebuilt Senior Team and growing Director Team



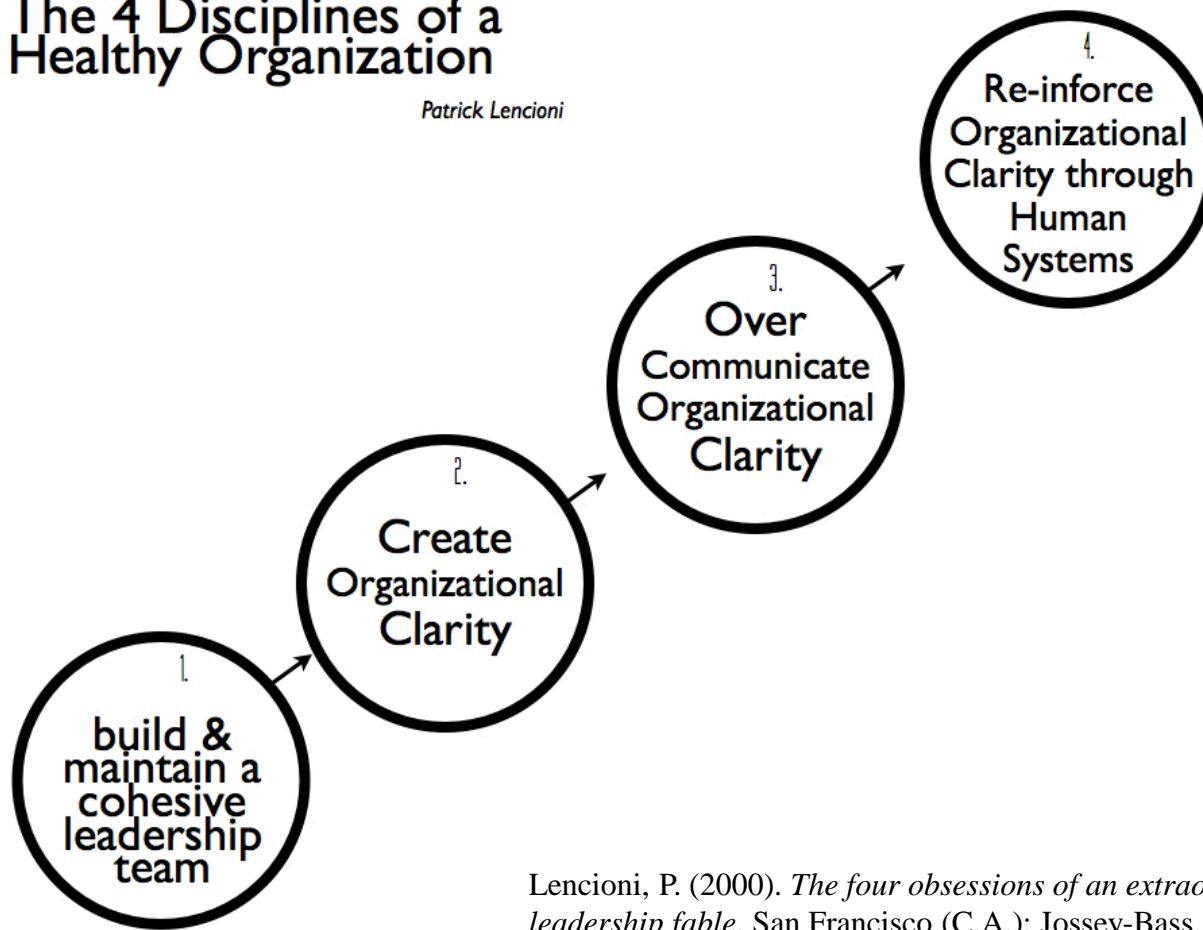


# As your business grows, the culture and workforce must grow with it...



## The 4 Disciplines of a Healthy Organization

Patrick Lencioni



Lencioni, P. (2000). *The four obsessions of an extraordinary executive a leadership fable*. San Francisco (C.A.): Jossey-Bass.

# Discipline 1: Build and Maintain a Cohesive Leadership Team



- Knowing one another's unique strengths and weaknesses.
- Openly engaging in constructive ideological conflict.
- Holding one another accountable for behaviors and actions.
- Committing to group decisions.

Lencioni, P. (2000). *The four obsessions of an extraordinary executive a leadership fable*. San Francisco (C.A.): Jossey-Bass.

# Discipline 2: Create Organizational Clarity



- Why the organization exists
- Which behavioral values are fundamental
- What specific business it is in
- Who its competitors are
- How it is unique
- What it plans to achieve
- Who is responsible for what

Lencioni, P. (2000). *The four obsessions of an extraordinary executive a leadership fable*. San Francisco (C.A.): Jossey-Bass.

# Discipline 3: Over-Communicate Organizational Clarity



- Repetition
- Simplicity
- Multiple mediums
- Cascading messages

Lencioni, P. (2000). *The four obsessions of an extraordinary executive a leadership fable*. San Francisco (C.A.): Jossey-Bass.

# Discipline 4: Reinforce Organizational Clarity Through Human Systems



- Hiring
- Managing Performance
- Rewarding and Recognition
- Employee dismissal

Lencioni, P. (2000). *The four obsessions of an extraordinary executive a leadership fable*. San Francisco (C.A.): Jossey-Bass.

# D1: Organizational structure for On Lok Lifeways



- Senior Team organized by function: Operations, HR, Regulatory, Finance, etc
- Directors Team organized by function: Operations, HR, Regulatory, Finance, etc
- Managers and supervisors organized by function and division: Program/Center Managers, Discipline Specialists, Department Managers, etc
- Leads organized by function: Discipline councils.

# D2: Strategic Planning



- All hands on deck for strategic planning.
- All levels of management were involved in the defining strategic vision, goals, and action plan.
- Planning occurred over various sessions that were departmental and cross-functional.
- All staff aware of strategic plan and how their individual roles align with the plan connecting their purpose and value to the organization.

# D3: Communication Framework



- Town Hall Meetings: Quarterly staff meetings led by Senior Team Managers on a rotation basis. These meetings are held at both a center and department level.
- Quarterly Leadership Meetings: Quarterly leadership meetings with both Senior Team and Directors
- Department Meetings: Weekly to monthly meetings led by the department heads
- Supervisors Meetings: Monthly meetings led by the Senior Team for all the different business units within the organization.
- Directors Meetings: Biweekly to monthly meetings led by Senior Team or other Directors from the different business units within the organization.
- PACE Program Supervisors Meetings: Monthly meetings led by the PACE Program Directors
- Discipline Council Meetings: Monthly meetings led by the council members and may or may not include the department head.
- Employee Newsletter: Bi-Weekly communications via paychecks highlighting key information for all staff



## D4: Relationships: Reporting responsibilities, accountabilities, coaching, mentoring, counseling, and recognition



- Hiring Managers, HR, and Talent Management work in collaboration to secure and onboard highly qualified and competent staff
- Matrix Management in place for performance management of interdisciplinary staff for day to day operations and discipline specific competencies and roles and responsibilities
- Functional and Divisional Management in place for coaching, mentoring, praising, and counseling of interdisciplinary staff.
- Discipline Councils established to create promotional opportunities of staff through a career ladder model.
- Staff recognition comes in many forms such as merits, appreciation days, staff professional development days, staff scholarships, above and beyond award, years of service program, and staff galas.

# Things to consider...



*When designing or redesigning your organizational and leadership structures/framework, start with the question of “**What does the participant need?**” and align your responses with the strategic plan.*



# Things to consider...



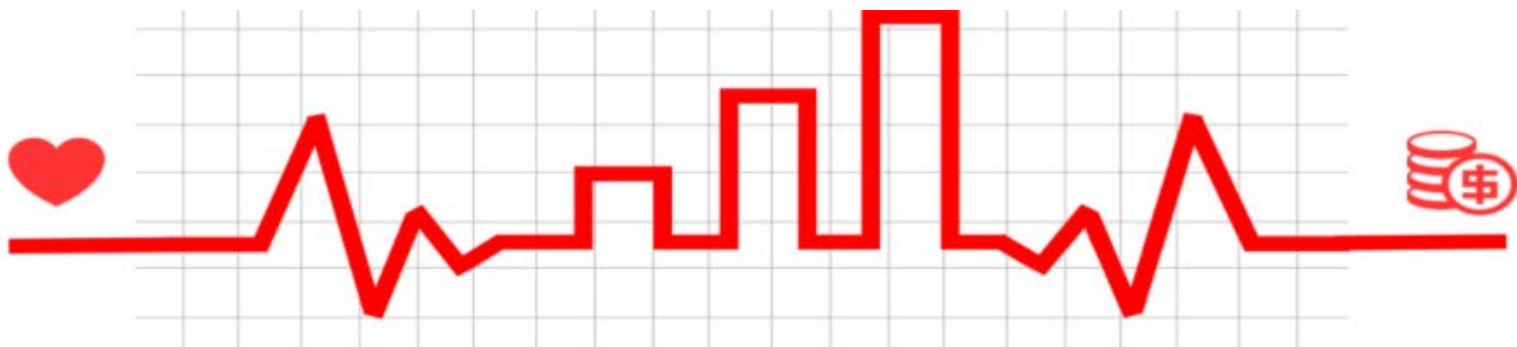
- Standard vs Unique features: organizational, regional, local
- Predictability: standard operating procedures, clear roles and responsibilities
- Communication system: regular, open, consistent, follow-up
- Visibility: regular, consistent, balanced
- Vulnerability: leaders won't have all the answers and be okay to communicate that; last to speak, first to listen
- Workforce identity: awareness of how staff feel about the organization and their purpose
- Expectations of your workforce: awareness of what staff expect of their leaders-recognition, knowledge, partnership, support
- Data: use data to drive your decisions: recruitment, retention, span of control, staff surveys



# Keep your finger on the pulse of the organization...



- ✓ If your organization is healthy, it will remain in a position to provide both your participants and workforce the foundation for a healthy well-being.
- ✓ In order to effectively manage an interdisciplinary model such as PACE, it requires that the organizational and leadership structure/framework be designed to function as an interdisciplinary team.



# Questions, Feedback, Ideas?



# Let's Connect



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*THANK YOU!*