



Built To Scale, Not To Break: A Growing Population Health Organization's Guide To People + Finance Infrastructure

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Speaker 1 0:00

Good morning. Is it still morning? I can still say good morning. It's 11:30. Good morning, and welcome to today's Knowledge Partners session: Built to Scale, Not to Break: A Growing Population Health Organization's Guide to People and Finance Infrastructure, sponsored by Allera Health. My name is Rachel Steinmetz. I'm the Executive Vice President, Chief Creative Officer at OPEN MINDS, and I'm excited to be joined by presenters Kai Gardner and Jen Emery. Before we jump in, I'd like to briefly call your attention to a few items. All sessions will be recorded in either audio or video, so if there is time for questions, make sure that a mic is handed to you. That way, you can get caught on the recording also and posted afterwards. Don't forget to follow the highlights of the leadership retreat on LinkedIn and Twitter, and please join us this evening at Beyond the Battle Museum for our reception starting at 7 p.m. Kai Gardner serves as Alara's Senior HR and Operations Manager at Allera Health, bringing over 10 years of progressive experience across HR, operations, IT, marketing, and organizational development. Trust with building scalable infrastructure from the ground up, Kai has led Laira's people and operation strategies since 2020, guiding the organization through 300% growth. As a key architect behind Lair's HR infrastructure, governance frameworks, and operational systems, Kai partners closely with the leadership to translate organizational growth into sustainable people-first systems.

Speaker 2 1:22

Thank you. It's always kind of insane to hear that, like read out.

Speaker 1 1:25

Jenna serves as the controller of Allera Health, bringing over 18 years of experience to the ever-evolving accounting landscape. Known for her precision and strategic insight, Jenna oversees the organization's accounting functions, financial reporting, and budget development. As a key architect behind Alera's financial performance metrics, she partners closely with leadership to translate day-to-day data into long-term organizational strategy, ensuring the company scales with absolute clarity and confidence. And with that, let's get started. Thank you.

Speaker 2 1:55

Thank you so much, Rachel. And I did tamper with the thermostat, so hopefully folks are warming up. But if not, you know we'll get you jazzed up. I just got back from an HR conference last week. HR people are lame, and I feel like I can say that as an HR person. So I will do my best to keep cheesy jokes to a minimum, but no guarantee that they won't be there at least a little bit. So I'll kind of kick us off and get us started. Of course, we did the introductions, and just thank you again for allowing us to have Rachel do those introductions because I cannot remember half of the stuff from those because there is a lot to cover and there's a lot that's been done over the six years that I've been with Alera, and then our wonderful Jenna has been with us for three years as well. And so here we'll just kind of briefly talk about what we're here to share with you all today. Not saying we've got everything figured out, but we certainly have learned some lessons along the way, and we want to highlight how awesome our people are! How awesome the organization is, and how Jenna and I have played a key role in building the organization. So we'll just kind of set the stage for everybody. We'll go over the growth. I'll talk about the people side. Jenna, of course, we'll talk about the finance and money side because we certainly do love money, right? And then we'll also talk about how we collaborate on various different things within the HR and finance infrastructure, and then we'll close it out. I think we're supposed to split that one, but I know that we go the next one.

Speaker 3 3:33

So for those of you who don't know what we do here at Allera Health, we build clinically integrated networks across the nation. We are primarily focused on behavioral health, although we do touch on different practices. Our one care networks we negotiate value based contracts for our providers with our payers so that we can the best contract available for them so that they can therefore you know help their patients on hand. So we work with behavioral health, Primary care, hospitals, and social care. Our founders have been mission-driven. They all come from direct care backgrounds. A lot of our senior leadership as well. Kai does a wonderful job of making sure that everyone who joins our team has some sort of direct care tie-in, so that we make sure that we continue to prioritize Alera Health's mission. And while our team is still rather small, we don't see that as a downfall. We see that as a benefit. It allows us some flexibility to. Meet providers where they are in their journey, and get the absolute best contracts for them, which in turn trickles down to better care for their patients, which is our ultimate goal.

Speaker 2 5:13

And by the way, if any questions pop up throughout the time, please don't hesitate to raise your hand or just shout it out. Totally fine. I definitely want it to be a dialog. I mean, Jenna and I certainly do have a lot

of information to share, but we're also happy to kind of discuss things as we go along. So part of the reason why we're here is to share what our organization is built as a population health manager, how that helps us serve our own people, i.e. our employees and those employees help the providers who are providing the care. How many providers do we have in the room? Just curious. Awesome providers, vendors, couple vendors maybe. Anybody else who I did not identify correctly or call out their role payers, MCOs, Non-disclosing, perfect. That's fine. For providers, for vendors, non-disclosed identities. It's all a very moving landscape slash moving target. I feel like, especially last couple of years, there's certainly been some exciting curveballs, and as I mentioned earlier, we certainly have not figured it all out. But we have certainly gained some knowledge over the last few years, especially with the exponential growth that we've experienced over the last couple of years, and how we have been able to stay aligned and stay on target with the mission and vision of the organization, and then lastly, we also make sure that whether it is someone who has their nursing experience and nursing credentials, or if someone has their social work credentials, or if someone was just an informal caregiver for a family member. Each one of our team members has a direct or indirect tie to some sort of behavioral health. I said identity earlier. Behavioral health identity. Each one of us has that kind of bit of experience, and so we're able not only to translate across the organization, but I hope that that the content that we share today translates to you all. So talking about that growth is this number seven. Hi, that's me. I was employee number seven back in 2020, before we had company laptops, before we even talked about having a formal handbook, and before we even had like a PTO policy, it was kind of like the Wild West, but it was a lot of fun. And I still remember onboarding employees eight, nine, and 10 at a Panera Bread. I do think that Alera should have some sort of connection, like Panera, Alera. Come on now. But here we are in 2026 with 31 employees. That's over four times employee growth. Of course, we've experienced some turnover like any other organization, and we've been able to navigate through all of that different movement throughout our lifetime as an organization. We've even had our first retirement last year. We had someone retire, which was really exciting. So I have been able to see the entire employee life cycle all the way to retirement, which has been pretty awesome. And we've had growth in every single phase. And you might see me like try to walk over here. I did put some notes. Of course, Jenna prepared way more than I did, just because I I do this kind of thing, especially with HR, quite frequently. But what we have done in every phase of our growth is we were intentional. We were intentional about how we moved, how we spent, how we hired, how we moved teams, how we evolved teams. And very luckily in 2022, we secured a Series A investment with a organization in Arizona that was one of the primary investors, and so we went from just operating in North Carolina with seven employees to operating in Arizona with even more employees. So now, boom, we're in two states, we've doubled. Then when we go from Arizona, our next network was in Ohio, so oh wow, hey, just a couple of years now, all of a sudden we're in three states. We'll talk a little bit more about our growth, but we are in even more states now, and our team is ever expanding, ever growing. The more folks that we have, the more complex that it gets for us as well. So as I mentioned earlier, when I started in the organization in 2020, we were just getting started. We were just building the foundation. I still remember placing an order on Lenovo.com for seven laptops.

Speaker 2 9:52

I barely bought a laptop for myself during college, so just purchasing seven laptops was kind of a surreal experience. And then, hey! Not only was I HR, I was now IT. And so, as we continued to scale, as we had more employees join the team, and as we needed more laptops, we needed more security because we were taking in more data. We needed additional infrastructure in terms of policy procedure. We needed help. We needed help, and so what that brought us is a partnership with a PEO in that kind of first

building the foundation. And apologies, I may speak in alphabet soup or acronyms. PEO is a professional employment organization. Is anyone familiar with professional employment organizations? So what they do is they partner with small to mid-sized organizations and provide all sorts of really wonderful HR infrastructure for an HR department of 1.5. And so, by partnering with them, we were able to not only establish how we were going to continue to scale and grow, but we have those policies, those procedures. We also continued on some forward momentum with that investment. We went through an entire company-wide rebrand. So we went from Blaze Advisors to Allera Health. Our CEO, while he is awesome at marketing, he is not our marketing person, which I'm very thankful for, depending on the day, but we were able to kind of take all of those beginnings, scrappy pieces of a very young population health manager, and grow us up into a nationwide population health manager, which has been very, very awesome. We're essentially we, and we use this metaphor all the time: is that we're building a house while we're living in it, we're flying the plane, or we're flying the plane while we're figuring out how to fix the plane and do some paint work. And then I'll share my other favorite metaphor a little bit later on as we continue this kind of exponential growth.

Speaker 3 12:02

So our projected path forward is an investment in our people and our resources. Using our resources to help expand our network because let's face it, we're not going to be happy until we can touch all 50 states. You know that's kind of everyone's goal there. And the next step is to stand up the actual state networks and continue to expand and deepen our connections with payers, so that future opportunities and partnerships that facilitate growth come easier. And then once the network is up and running for around 20 more, 24 months, about two years, that's when we expect to start seeing the network being sustainable. And it is definitely not a quick and easy feat. It's more of an uphill battle that we all work together to hit different benchmarks along the ways, so that we can we can get where we need to go.

Speaker 2 13:11

So, what does it all mean as we're continuing to scale, as we're hoping to expand to all those 50 states? One question that we consistently ask ourselves is, where can we improve? How can we scale? And where can we manage costs while maintaining or increasing quality? I couldn't remember if maintaining or increasing came on there. But as we're continuing to grow, expenses grow, complexity grows. So many different things are impacting the way that we operate, and we also operate in multiple states. Yes, not only within our OneCare networks, but we have employees across 10, 11 states. How many folks are multi-state? Anybody familiar with a little state called California? There is an entire HR specialty for employment in California, and so being able to navigate all of these different regulatory landscapes, making sure that everyone is operating off of the same policy. For example, one of the more specific items that influences how we evaluate our compensation and benefit package is PTO. We all love PTO. I know I certainly love PTO, but we have to have a distinct sick and vacation bucket because we have employees in states who have mandatory sick leave. Our approach is not just to have special policies for certain employees in certain states, because then we have to remember what all of those different special policies are for those different states, and so what we do is we take the most generous of whatever the policy is that we need to implement, and we make sure that that's rolled out across the organization. Not only does it help us maintain that that same policy and procedure for everybody, but it also puts everybody. On that level playing field, we do have a very lateral organization, and we want to keep that

lateral structure as much as we possibly can, while also maintaining and/or increasing the quality of employment with Alera, and then therefore maintaining or increasing the quality of the services that we provide to the providers, so it's not just the one time that we do like some sort of strategic exercise or anything like that. In January of every year, we do bring all employees of Allera to Wilmington, North Carolina, which is where we are headquartered. It is technically at the beach. January isn't exactly the greatest beach weather, but hey, it's the beach. And so what we do is we have everyone come to Wilmington, and we have two and a half, three-ish days for just fellowship, for team building, and then also for sharing with each other what went well last year, what could we have done better, what is our plan for the next year. What's growth going to be like? We have continued to develop the staff retreat over several years, also because we have grown so much. But we are very intentional in making sure that the team gets something out of that retreat, other than just you know food and beverage and lodging for a few days. We want to make sure that they get time with each other. These are the folks that are talking to each other on screens all day that might not necessarily get to see Jenna and I haven't seen each other since the last retreat. So us getting to be here in Gettysburg with all of you wonderful people is a pretty awesome opportunity. So we make sure to make that most out of that annual retreat each year. Hey, I'm gonna keep talking. I'm gonna keep talking about people, which is honestly one of my favorite, and admittedly sometimes least favorite things. Because us people, we are kind of complex, and we have learned even more so how complex people can be as we are now managing 31 of them on the team. So while seven people doesn't require, say, hey, a full-fledged handbook, it does require some policies, some procedures, some things that are written down, some forms that you know everybody loves to fill out a form. No one, just me. Hey, so 31 employees, we're building out in complexity. We also have to have state addendums for our handbook and some of our policies and procedures. So I believe whenever we did our first handbook, way, way, way back in the day, I think it was a whopping 81 pages.

Speaker 2 17:34

Yes, it is a lot, but compared to today's 135 pages, I was literally just reviewing it before I came down here. Needless to say, we've learned some things along the way. We've been able to make those shifts and changes as we've continued to expand. So not only is it having to anticipate the things that aren't there, but it's also navigating the things as they come up in real time. Oh, we need to write an employee up. Hey, is there a form for that? And then that's also where our professional employment organization, our PEO, comes in. They've got forms for just about everything as well. And so, as an HR department of one and a half, not only am I able to leverage that partnership with the PEO for those things, but also I have a membership to the Society of Human Resources Management, or SHRM, and SHRM has a whole lot of resources. So all of these kind of combined powers help us scale at the rate that we are scaling. One of the really awesome things, other than just our people in general, and yes, I am a little biased because I helped hire almost all of them. And that being said, is everyone is for the mission. It is a lot to say about the folks that we hire that they are excited about waking up that day and helping people. They are excited about the mission. They're excited about the outcomes. They're excited about that story that that provider shared of how the services were able to influence and improve someone's life, or maybe even save a life, which is like getting ramped up just talking about it. It's pretty awesome, and it's really cool to see our folks light up when those kind of things happen. Our hiring process has been a work in progress throughout the entire time. And one thing that we added, we started doing it in the beginning of requesting a work sample. Very simple work sample. We're not talking like a 500 question cognitive test. We're not talking, hey, how do you get the elephant into the refrigerator, nothing like that. It is always directly related to the job. It is designed to take less than an hour, and then that results into a 10 to 15

minute presentation from that prospective employee, where they are able to actually see the work that they would be doing, and for us to be able to see their quality of. How they're thinking, and it really surfaces amazing candidates. It also helps us weed out some not so amazing candidates, or maybe candidates that are amazing for another position in another organization. But by us being able to evaluate what that process looks like, while also still being able to keep to timelines of where and when we need that position has certainly not been a small feat. Continually looking at the infrastructure, continually evaluating what that infrastructure is doing is not necessarily a burden. It's a lever. It's a lever of hey, we've got to push this so that we can hire four new people over the next six months, or hey, we've got to pull back on this so that we can retain the employees that we have right now. We need to pull this lever over here to attract the top talent that we're looking for. Any questions so far? Because we've gone through quite a lot of information, and hopefully, I'm making somewhat sense here. Somewhat sense, at least. Okay, beautiful. Thank you. A lot of these sessions, as someone who's been to many conferences, I don't want you to just sit there and just listen. I definitely appreciate you all's responses and interaction as well.

Speaker 2 21:23

That last metaphor that I wanted to share with you, one of the very first things that I share with prospective employees or candidates whenever we are doing the interview process is that we are literally building and fixing the rocket ship while it's flying through a black hole in the Mariana Trench in the ocean, because that's what it feels like sometimes, and that is for some people, and some folks prefer like a school bus that's you know going through the school zone at a little bit more moderate speed, but it certainly helps us frame what the expectations are and what that person is going to get into once they join the awesome team at Allera. So I mentioned again earlier the PEO. We don't just sign a paper each year and they give us our open enrollment information and then we never talk to them again. I have a biweekly call, sometimes weekly call, with our business partner with the PEO that we work with, and I even have her cell phone number. There are not many clients that she has that she willingly gives her cell phone number out, and I think that that speaks volumes to the relationship that I have with her, and it is wonderful. I mean, last week it was her daughter's birthday. I got birthday pictures. It was absolutely incredible. But it's so important to leverage these relationships because there are also things that we have been able to negotiate and work through if things get complicated or if there's an issue that comes up. I know that I can call up Cherise and I know that that whatever we need is going to be handled. This isn't the only relationship that we have, but certainly this is one of our most important. I mean, tomorrow Jenna and I need to run payroll, and that is with our PEO, and we're both here at the conference. We're going to make sure it happens because that affects our pay too. But also being able to trust that hey, we have all the information that we need, we have the guidance, we have the support, we have our payroll specialist with our PEO basically on speed dial. She responds to us very quickly, which is wonderful. But it helps us not only scale intentionally, but also helps make sure that everything goes without a hitch because we have that PEO relationship to leverage. I want to make sure that I don't have anything else in my notes here. So, not only are the roles tangential and collaborative, but there are also different lanes that we stay in. So, Alera continuously manages, monitors, and grows the day-to-day operations. We are the one who set the policy. Of course, the PEO helps us know which policies we need and which policies are mandatory, and then also all of those other operational policies that we implement. We're able to consult with our PEO and also be able to do research and and evaluate the impact of some of those different policies and things that we implement to make sure that everything goes without a hitch. It requires management. I'll talk a little bit more about other vendor management as well. But if you are going to use

a service, and I think this speaks for almost anything, it requires more work than just signing a piece of paper and expecting the next thing to happen. And I think that that has been a major source of strength for us. I'm gonna check my time too. Oh, oh, hey, look, it's right there. Oh, that's awesome. So as I mentioned earlier, I am a member of SHRM. SHRM also has a really wonderful credentialing and certification program, which also means CEUs. It means continuous development, research, different things that I am able to pull from and learn from. I was very happy and relieved when I was able to accomplish the senior certified professional at the top of this year. That certainly speaks to kind of all of these different moving parts and all of these different. I'm so glad you're okay. But all of these different levers that we have to navigate each and every day, and working directly with the CEO and COO, working with our controller, working with our IT vendor, working with our HR vendor, and being able to navigate what's next.

Speaker 2 25:53

Because it's not just about hey, what happened, what's happening. It's about what's going to happen in the next few years, because we're just going to continue to grow exponentially. Legal counsel, legal is your best friend. Legal is often something thought of only in emergency situations. We are very fortunate to have an internal legal counsel. Farissa is absolutely incredible. She served as the attorney for the city of New Orleans through Hurricane Katrina, which again our people are just so awesome. But I know if there is anything that I'm even thinking about having a question on or something that might happen, I know that I can run it by Farissa, and I'm going to be able to have an informed legal form of advice so that we can continue to navigate any issue that might come up, and then lastly, of course, being able to show up with leadership. I often, in fact, whenever I first got hired, we just had C-suite and vice presidents and senior vice presidents. So I have consistently been a part of the executive team, and by being able to connect with them, communicate with them on a regular basis, I'm able to know, hey, leadership is going to align with this, or leadership's going to have questions about this specific thing, or hey, if I'm going to approach leadership with this a policy proposal, I'm going to need to bring a financial report or some sort of analysis to make sure that everyone is on the same page, and then that leadership, especially our supervisors of our team, which I am also a supervisor, we need to help navigate and grow and develop our teams as well. There are a lot of kind of silos that I have seen in different organizations or on different teams, and they just kind of operate on. Hey, there's this institution. Say something like Shrm, or something like can't think of another one right now. We'll come back to that. But any or those organizations, they solely lean on that. Or hey, any time a remote issue comes up, let's call external legal counsel who specializes in the super specific thing that's going to cost us \$300 an hour, and we need to call them for a total of 20 hours this month. That can add up really, really fast. And then if you have an echo chamber within your leadership, that's just going to be an echo chamber, and it's never going to leave anywhere else. So instead of just having one of these things, we make sure to leverage all of these things, and then when new things come in, we're able to navigate and include those as well. Because we want to take not only are we taking a whole person care approach to the work that we do every day as a population health manager, but we're taking a whole person care approach to the work that we do within the organization. Okay, I think just a couple more. All right, and then and then it's back to the real superstar of things. But as we are continuing to build these different things, we make sure to focus specifically on how do we attract, retain, and develop the top talent that we need to do the work that we do at the pace that we do it. One of the biggest things that we were able to really add some meat to the bone on is our performance management. So, utilizing our relationship with our professional employment organization, we've been able to get some resources, do some trainings. We also have a system

infrastructure in place for performance management because it's not just write-ups; it's kudos, it's documenting, telling a story. You know, do you have a department or a certain supervisor who provides feedback in one way and they document it another? Do you have a team who consistently performs, gets promoted, or develops, and then what does the performance documentation piece or the overall evaluations for that employee that's been here for four years versus one year? What is that story telling, or what is that story starting to tell? We also want to make sure that we're running things against industry. Standards as well as kind of overall standards.

Speaker 2 30:03

I know Jenna and I just completed a very exciting project at the top of this year of looking at everybody's titles, everybody's pay bands, everybody's structure within the organization, and how that was communicated slash how that was perceived in the organizations that we were serving, so we had a very large feat of some of our midline staff was their titles were directors and executive directors. When these folks would go into organizations where they had directors and executive directors, it got a little bit confusing in terms of okay, so what is your role here? We were very fortunate to work with folks within those organizations that we provide services to, and come up with, for example, terms like practice and network transformation specialists. So hey, you know, it's hey, I'm a practice and I'm part of a network, and we are looking to grow. We're looking to develop. We're looking to transform, and we're specializing in it. Yes, it's a little bit on the nose, but now whenever those folks are within those different practices or networks, they know exactly what they're there to do, and the practices and those administrators, they know exactly what they're there to do. Professional development. Hey, Jenna and I are here doing this as part of our own professional development. We have a team who is going to the Philadelphia conference, so OPEN MINDS is certainly a wonderful partner for some of that professional development. But then we also have one of our team members who is going to an all counselors conference in another state as part of their professional development, with all of us being remote, some of these different opportunities not only allow in-person interaction, but they also allow, for example, continuing education credits towards different licensures or towards different specialty credentials, and it also helps us as an organization because as our people do better, we do better. We're able to provide better services. So I cannot emphasize enough how important it has been to really make sure that we are bringing home that professional development for our folks. These last three here, by no means am I going to go through line by line or each. It is all about policy management, baby. It is all about security. It is about governance. We manage a lot of data. We manage a lot of what is it called? PHI, of course, but a lot of confidential information. We have a lot of intellectual property, and so we want to make sure that not only are we protecting it in general, but that we're providing the resources and the infrastructure to make sure that all of that confidential information stays confidential when it comes to personable, personal identifiable information, personal health information, whatever it is, we want to make sure that we are doing what is needed and that our people have what they need to make sure that that stays where it needs to stay. So hey, here's a few things that we would do again. That hiring for mission first is really part of our secret sauce. You're welcome. But not only does it make us better as a population health manager, it also makes going to work like really fun because we get to hear different stories, or we're getting to connect with each other on a different level. Other than oh hey this report is due or oh hey this practice is really struggling. It's hey, I get to take care of my mom, or hey, this is going on at school. Being able to have that connection with your coworkers has been paramount. Again, treating your partnerships or your vendors as more than just vendors. The culture investment of the annual retreat. I mean, hey, we're flying people, or folks are driving from different places in North Carolina to come to the coast. We're feeding

them. We're making sure they have a place to stay for multiple days. It is an investment. It is a very intentional investment to make sure that our people are not only connected to the work that they do, but connected to the organization as well. Getting policy in writing. I cannot tell you the amount of times that I have a handbook right next to my desk at all times because when you have something in writing, it makes it a lot easier to reference.

Speaker 2 34:32

It makes it a lot easier to share that information with employees. And when you don't have it in writing, it's not a panic moment. It's a okay. So what are we going to do for right now, and then what are we going to do to put this in place so that it sustains for the future? Also, when we tie either performance or individual evaluations to outcomes, especially through incentives, so performance bonuses or hey, you. Great, you know. Here's a what did we do? Pullovers. We got Allera Health NC One Care, which is one of our specific networks, pullovers for our folks. So being able to reward our employees when the organization is rewarded speaks volumes. And then lastly, we do the last couple of years, and then this year again, we are going to do individual communication style training, so disc training. We've also done Clifton Strengths Finder before. Some folks really love them, myself included. Some folks really don't like them. But no matter what, if you like them or if you don't like them, it gives everyone a common language. It gives everyone a common base. You can go, oh, hey, so and so is an I, so I know that I need to, you know, approach them with this certain type of communication. Or if I have this goal that I'm trying to accomplish, I need to frame it this way for this specific person. And it has really helped enhance not only our supervisor's leadership, but it also has enhanced our people. Okay, almost done. Almost done. Here are the things that that you know we wish that we wouldn't have to do again. Slash, hey, here's what happened, and here's what we're going to continue forward. Anticipating what you need in terms of infrastructure is huge. It is really hard to build a 130-page handbook if you never even had a 30 or 80-page one. If you have folks who are taking parental leave or personal leave, I really hope you have a leave policy in place. We have a very diverse and remote team. Not only are they geographically diverse, they are demographically diverse, they are generationally diverse. We have folks who are really, really great with technology. We have folks that I have had to instruct them to put batteries into a remote to make sure that it works. Now, all of our folks are incredibly bright, and all of them are for the mission. But it's some of those things that you have to remember. Hey, not everyone thinks the the same way that you do, or not everyone has grown up with. I hate to say it. I know it's a trigger word. AI, but not everyone has that same experience or that same perception on something that you might have, performance conversations gets harder as the team grows. Not only does the team grow, personalities grow, habits grow. You have someone with the organization. I mean, we went from Google to Microsoft. We went from Box to SharePoint. We had a system called Sharefile at some point, and next thing I know, people are calling share file share point and share point share file. So then we just started calling it not box because that's what it used to be. So being able to kind of navigate all of these different things with different employees makes things a little bit easier. Lastly, making sure that you're actively managing the different pieces and parts. HR and finance, and Jenna will share a little bit more about how the different levers kind of affect each other. But also, what does legal have to say? Are there any legal ramifications for this? Finally, all right. You want this? Yeah. You can do it. You just let me know.

Speaker 3 38:22

Yeah, so we are going to talk about the financial side. Alera's financial leadership consists of the CFO and myself. Our CFO is amazing. One, he represents us to our board and tells them all our financial things. He also strategizes for us, so he is always looking five steps ahead on where we're going to go and how we're going to get there. He has truly been a mentor to me, and he's just a genius. So I love him. Anyway, as the controller, I report directly to the CFO, of course, and to the COO. I execute the next steps to make sure that we stay on course, and I do so by doing monthly, quarterly, year end, all those things, financials, budget development, evaluating different performance metrics and kind of just all the time doing budget to actual variances all the time. So that's kind of what I do there. Our executive team is always included in our financial like decision process, it kind of makes us have a great edge because we get to hear their opinions and then their you know dreams on how to move forward, and we tell them about ours, and we kind of come together with. Plan to move forward that works best for us as a whole. So it's really neat. Not everybody does that, including you know different departments, heads, and that kind of thing in big decisions. But we do, and it's amazing. We come up with ideas that we would have never came up with on our own. Go ahead. Okay, so I have been at Alaira for three years now. When I started, we had one budget. It was a monster, but we had one budget, and our separate departments were not involved in this budget process at all, so they were kind of in the dark about how much growth or development that they can have within their department. So something that we started doing was getting all of our budget heads to our department heads to do their own budget. It was quite interesting because not everybody has had the rein to do that in the past. So it was a learning process to get them to think ahead, think big picture, and then work with our COO and me to perfect it on what growth we expect to see next year, so it actually helps grow their financial literacy a good bit. Which you know, if our teammates are more well-rounded, then Allaire is going to be more well-rounded As well, so another thing that we do is financial performance modeling. We kind of have it interactive right now, so we can at a click of a button be like, "Hey, if we do two networks the next couple years, this is what's going to look like in five years. If we do five networks, and it will show us kind of the investment we need to make, the people resources we're going to need to make, and the outcome of what we should expect to see next. As a startup company that's still kind of in its younger years, we look at financial growth by asking one question: Are we moving towards sustainability? As you all know, like each network partnership that you start, it has short-term cost that you're going to have to absorb. However, if we continue to project conservatively and test our assumptions on a regular basis, we will continue going in the right direction. All right, our CFO partnership works wonderfully at this current state of Valera Health. It allows for expert financial expertise on an as-needed basis, and in order for this model to be successful, it requires a controller who is rather controlling that hands that is hands-on and in that day-to-day monitoring closely. Another requirement for success is to partner partnership with operations, with HR, with legal, to make sure that we stay competitive in our compensation packages, as well as stay compliant in our federal and state acts. Our financial lessons we have learned is we need to budget for the team we want, not the team we have. If you don't plan on your team growing, your company will cease to grow as well, or you'll end up suffering in quality, which is arguably a lot worse. So always make sure that you're planning ahead for growth. Lesson two is to build board-ready reporting. The earlier, the better, because if it's taking you weeks to get board-ready financials, then you've already outgrown your system. You need to make sure you have a system that will allow for growth, for increased complexity, so that you don't have to switch years later because then you lose some of that historical data. And if you're anything like me, that that is key. Like you can't operate without. You have to see where you've been to know where you're going. Another lesson that we learned is tie financial performance with people performance. Once they

see that link together and as a whole, the company performance. They will be on the same page and working towards that same goal because they have incentives. I mean, everybody works for incentives, you know. Even dogs work for incentives. So it's one of those things that is very important to us to like kind of teach that financial literacy for everyone and know what our goals are for the year. Lesson four is probably the most important. You need to model your company for like best performance, sustaining as you are, and for your financial runway. A lot of people don't like to think about financial runway. It is not a pleasant thing to think about. However, with uncertain times and contract complexities, you always need to have this number in the back of your mind so that you can plan for the worst but hope for the best kind of deal. Because it is uncertain times right now in the medical industry, so we have to keep that in mind and know where we stand financially on reserves.

Speaker 2 46:17

And next, we're back, and IT is here too. I think pretty much all of us rely on technology of some sort of form or fashion, whether it is again scary word AI or an operating system, CRM, a RCM, the revenue cycle management software, and it is very important that not only are we getting along with our systems, but our systems are getting along with us too, along with the technology. So, with every, I mean, in general, every decision we make has some sort of impact somewhere else in the organization, and also on the services that we provide, and lastly, of course, on our people. So, making sure that we are going through different things such as designing our compensation package or our benefits. What are some non-traditional benefits or compensation avenues that we could approach? What are we doing to invest in our people, how does that affect our budget? Hopefully, long term, we see some ROI with more developed folks. We're going to do better work. So continuously, hey, yes, this is an upfront cost, as Jenna was talking about earlier. But in the long run, it's going to have major payoff for us as an organization. Was there anything else I wanted to talk about? No, Jenna, take it away.

Speaker 3 47:49

So finance and HR, we have to work hand in hand, and luckily, I love them. So we are like a seesaw. Every decision one of us makes the other one feels so. We work closely together so that we're not throwing anybody off. Basically, we plan on when to hire our next person is the right timing so that we don't hinder growth. Like I was saying before, but we just stay in close contact so that we are constantly aligned and operations and is aligned as well.

Speaker 2 48:29

And tomorrow for payroll, we'll probably be sitting next to each other. Yeah. So I do a lot of our vendor management. In fact, I help manage a lot of our relationship that we have with OPEN MINDS, which also I love them. I love working with them. They are a wonderful partner. Jenna is also an incredible partner in bringing all of this together and also making sure. Hey, did you see that invoice from that vendor? Because we almost definitely did not, you know, ship that. Or why is this all of a sudden \$70 when last month it was \$40? Sometimes I do my best to catch that because also that's part of us helping each other in our seesaw of what we do every single day. But it is absolutely key that all of these things get managed in a way that not only we get the services that are meant to be provided, and we get the support that we need, but also that we're able to build and connect those relationships for things that we might need in

the short term or the long term. I know that I put a couple of things that I wanted to say, so it's it's thank you. She pointed exactly to what. See, this is why we work so well together. Is whenever we are able to make sure that our vendors have what they need for them to best serve us, we can best serve our people. We can best serve our clients, and then our clients and those providers can best serve the people that they serve as well. So not only is it managing. The PEO. It's also managing our managed service provider, who provides our IT infrastructure. But we make sure that it's not just a sign a contract and we're done. It's hey, are we communicating regularly? Are we providing feedback to each other? How can we be a better client, and how can they be a better vendor?

Speaker 3 50:20

Our operating model has both HR and finance working directly with senior leadership daily. When we are all on the same page, it helps everyone else fall into place and drive towards that same mission. Our Allera's power really is our people. Every decision that we make incorporates feedback and evaluates impact, resulting in sound decisions with both our employees and our network's best interest in mind.

Speaker 2 50:55

So, what this means for not only population management organizations like us, but for care providers, for vendors, for other folks, is that all of these lessons are transferable. All of these different things and tips and tricks-they are not brand new. We certainly didn't create all of them by ourselves, but we hope by sharing some of this recipe, some of the lessons learned, help you all serve the folks that you serve and partner with as well. So whether it is partnering with a population health manager for a provider organization, or whether you're an executive of one of our fantastic vendors that we have here, all of these different things can translate into more awesome organization because we enjoy the work that we do. We want you all to be able to enjoy the work that you do. So hey, we're bringing it home. We're landing the rocket ship. Build the infrastructure before you need it. These are kind of the top things as someone who was with the organization from the very beginning. Try to anticipate. You can only anticipate so much, but think of those runway scenarios, or think of those zero day vulnerabilities for any of my IT nerds in the room. Think of those things that you're able to reasonably anticipate. People in finances is the conversation are the same conversation. Excuse me. People cost money and people make money. Money, people, they are same. And so always make sure that your people in finance, team members or leadership, are in the same room at the same time, and then know what to own, know what to partner on. Notice how I did not say outsource. We do not outsource; we partner, and that is the key distinction on making sure that you are getting the level of service that you need or the level of support that you and your team need as well. Bringing back my mantra, and actually I think I might formalize this mantra going forward, is where can we can improve? How can we scale without maintaining or sacrificing quality? Shoot, and I totally messed it up. Anyways, we're just gonna move on. Questions. So not only do we want to hear questions from you, but we have some questions for you. We would love to hear from you. Of course, participation is not mandatory as much as I wish that I could make it. That's the inner teacher in me. But what are you all doing for your financial and people planning? What has worked? What lessons have you learned? Yeah, yeah, and also ask questions throughout. Yes. Oh, sorry, microphone. Selman, my my man. Yes. These are for virtual folks, not in the room. See. Okay.

Speaker 5 53:56

Just, it sounds like you guys have a fantastic PO that you work alongside. What are some of the criteria you use to evaluate a PO and select it? And given that, I don't know if you selected them prior to going to multi-state. Do you pick a PO that's multi-state? Like you're expanding to your plan is to expand to 50 other states. So should it be a PO that's already knows all the HR complexities of 50 states, or do you kind of build as you grow? So two questions in that.

Speaker 2 54:27

Great question. And what's your name, by the way?

Speaker 5 54:29

My name is Alina.

Speaker 2 54:30

Alina, thank you so much for that question. And funny enough, we actually re-evaluated another PEO this year because we have been with our PEOS since the beginning. One, we like to keep them on their toes a little bit, and then two we want to make sure that we're getting the services that that we deserve, but the services that our people deserve. And so some of those criteria I did we knew of this PEO whenever I first started, and we had heard really. Things we had gotten a little bit of a referral from a very trusted partner, so at that time we went with that PEO. Overall, it has been hopefully successful. They certainly do cost a pretty penny, and it is also still way worth it to remain in compliance with regulatory, all those different things. So at that time, I believe when we brought on the PEO, we were in two or three states. I think North Carolina and Virginia in terms of employees. As we've continued to grow, part of our strategic partnership with that PEO was making sure that they had multi-state compliance, especially California. So making sure that they they know the landscape in all of those different places. System integration. So with the PEO that we currently have, and you'll notice that I'm not saying their name because I don't want to inadvertently give them a little bit more promotion. But they are awesome. Happy to talk on the side. But all of their systems are in one thing. So employees just have one login for performance, for timekeeping, for paycheck stubs, benefits, all 401k expenses, travel. I mean, everything. The learning management system, everything is in one place, so it's a seamless experience for the employee. Support and support availability. They're not available 24/7, but they have a pretty darn reasonable availability for support, and then also their benefits offerings. So yes, we get the final say so in terms of what benefits we provide to the employees. But as far as like what insurance provider are they working with? What does, in fact, one of the really key questions that we ended up asking was, what is the, for example, life insurance benefit? You know, currently our employees get this amount, which could be, you know, a year's salary for their life insurance. If that's cut in half, that's a major loss for someone if they unfortunately ended up having to use that life insurance benefit. And so it's really the benefits. It's the communication relationship slash support, and then that systems integration slash the employee experience. Was that helpful? Awesome.

Speaker 3 57:13

And on the finance side of that as well, it is integrated into different financial platforms. They have a way to integrate that into QuickBooks. They have a way to integrate it into Realit. All of those things, so that you're not having to create journal entries or do anything manual like that. So that is also really key for us, so we can see how each network is Performing people-wise, so,

Speaker 2 57:44

and that's why Jenna does the books. I would love to hear from other folks about finance and people needs, or do you have any vendor relationships that you manage a certain way? Does anybody work with a population health manager? Anything anyone wants to share slash anything to ask. We're not wrapping up just yet. I'm not letting you get away until one other person at least. We're still doing great on time. However, I do know that we are very brave doing the session before lunch. I know I'm hungry.

Speaker 3 58:21

Yes.

Speaker 2 58:26

Any other questions? How do you develop the culture with 30 employees? Great question. I am so glad you asked. Our culture is something that was very intentional. It translates not only into just what we do every day. Like I'm gonna like tear up thinking about it. Jenna and I got a whole bunch. Oh darn it! Okay, really kind and awesome words from our team in like our all team chat of like good luck. Like it's gonna be awesome. You all are awesome. Not everybody gets that. That's pretty awesome. In our handbook, for example, yes, our PEO provides kind of a template of all those different policies. Again, some optional, some mandatory. We have quite a bit of leeway with some of those optional policies, and so one thing that I made sure that we included in one of our optional policies, which was the dress policy, making sure that we referenced any sort of cultural or identity-specific dress, or changing something like oh gosh, what was it? It was addressing hygiene, and essentially it was kind of an indirect way to say, hey, if you're gross, don't show up to work. Hey, what if that person their water is out, or what if that person might be experiencing being unhoused? Fortunately, that is something that we have not experienced in our own organization, but it's something that I want to make sure gets communicated to employees so that they know that they can navigate and have those communications. Another policy that we have bereavement policy. I don't know if anyone else knows this. No one's getting out of this alive, and so when employees experience a death in their family or a death of a loved one, not everyone has that same relationship, say with their parent, as they do that uncle that they spent all of their time with, or maybe it's someone who they're not even blood related, but that person practically raised them with an informal adoption or formal adoption. Making sure that our bereavement policy included the time that those employees could take for themselves and their families was something that was really, really key. We're a behavioral health company. Our literally our whole mission is to help other people in behavioral health. So we want to make sure that we're not only walking the walk, but we're talking the talk. Any questions, comments, things that you want to share? Okay, who's ready for lunch? I know that there's going to be a request for survey and feedback. I would absolutely love for you all to complete those. I know that they're kind of a bear while you're here doing work, while you're here attending sessions, doing tours. But would love to hear from

you. Our contact information is also up here. Selfishly, going to give the LinkedIn plug. Would love to connect with you all on LinkedIn, and of course, like our page. Any closing thoughts from you, Jenna?

Speaker 3 1:01:26

No. Thank you.

Speaker 2 1:01:30

Thank you very much.