Back to the Basics of Clinic Operations

Strengthening Your Base in Order to Move Forward

Marty Hiller, Senior Clinic Consultant
Empowering Community Healthcare Outreach

Forward Thinking May Cause Us to Forget the Past

"He who forgets the lessons of the past,
cannot build a strong future." Benjamin Disraeli

Starting a Clinic Involves a Step by Step Process:

Visionary Leader Imagines a Solution to a Community Problem
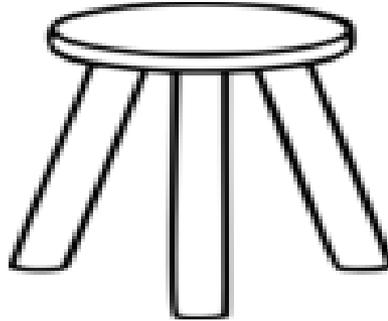
Planning Team is Formed

Sponsor is Sought

Planning Team Designs and Structures the Clinic

Building a Strong Clinic into the Future Requires following the Process from a strong base.

Solid Clinic Base Requires All Three Legs of a Stool

**<u>Organizational Values</u> were / are key ingredients. Time passes and things change, but the core values remain.
**Base of the Organization is Dependent Upon Strength in Three General Areas. All three areas were originally defined / established early in the clinic's history.

     I.   Governance

     II.   Operations

     III. Culture

Governance/ Reminders

I. Clinic Planning Team establishes permanent Guidelines – Board controls the Evolution of Change.

    A. Clinic By-Laws – Submitted with your application for a 501c3
        Provides outline for Board Structure & Office Terms
          Should be reviewed every 2 – 3 Years
          Some Clinics Review coincides with Strategic Plan

    B. Board Member Job Description
        Outlines Duties & Responsibilities of Elected Board
          Provides Guidance for Nominating Committee
    C. Board Member Evaluation
          Performance evaluated annually or at term.
    D. Permanent Committee Structure
          Does it remain relevant / essential
          Do Ad Hoc Committees remain needed
    E. Strategic Plan – Board Responsibility
          How often is it reported on – each board meeting
   How often is it reviewed & Updated - Annually

Operations

Operational Policies & Procedures tend to evolve over time
Change occurs for a variety of reasons
Patient population changes, requiring adjustment
Volume of patients increases, requiring change
Services expand, requiring change.

Operational Policies can be approved and then, over time, become ignored.
Staffing / Volunteer changes.
Policies become out-dated

Operational Policies are a continuous work in progress.
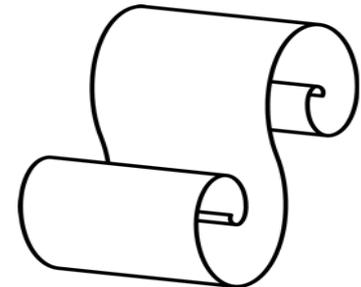
Operations

Let's Not Forget the Details, Assuring we are Complete and Up to Date

Internal:
1. Medications
   Are we securing those medications we need? Are there alternatives?
      Have we explored ALL options for securing the most economical
      pricing?
2. Data Collection
   Is this an essential part of our operation?
   What data is collected and why? How do we use data collected?
   To whom do we report? How is data tied in to marketing?
3. Expansion – Can we, should we, is there a need to grow?
   Do we have a solid base upon which to build?
   What resources are needed? (Manpower, Funds, Space, etc?)

Operations

II. External Relationships

What is our Community presence? Do we have a Marketing Plan? Are we known to the donor community? Are we known to the potential patient community?

Are we seen as an independent entity or part of a safety net?

Are there other organizations in our community who are duplicating services we provide?

What are our external relationships with the other safety net providers in the community?

Operational Reminders

Your Organizational Values can Guide you toward that which has been overlooked

I. "Treat All Patients with Respect & Dignity"

Good test is to apply your patient process to yourself.

Time - How lengthy is a patient visit?

Comfort – Are patient accommodations available throughout visit.

Privacy – Are HIPPA regulations followed as well as other "common sense" measures?

I. "Provide Quality Care"

When asked to list clinic strengths, almost inevitably one of the answers given is "We provide quality care!" I respond, How do you know?"

Do you have a Quality Assurance Plan? Is it Board Approved?

Do you use the Plan routinely?

Are the results of the process reported to the Board?

Is the QA Plan routinely reviewed and updated?

Do you have a Risk Management Plan? Is it routinely followed?

When is the last time you had a fire drill?

Operational Reminders

III. "Good Stewards of Resources"

Do You have Donor software? Is a specific member of the paid staff assigned to enter all data?

Do you communicate with donors? Acknowledgment letters, Newsletters, Website?

Do all donors receive a **timely** response to their donation?

Does the Executive Director/Board President sign the letter?

Do you have a Donor Cultivation / Recognition plan?

Do you have Grants Management software?

Do you submit "on time" reports as requested by Grantees?

Have you built in appropriate checks & balances in your financial system?

Does the Board receive regular financial reports?

Do you conduct an annual independent audit?

Operational Reminders

IV. "Staff & Volunteers are our MOST Important Assets"

Do all staff and volunteers have a job description?

Are ALL staff and volunteers <u>oriented & trained</u> for their clinic role?

Are all staff and volunteers evaluated annually?

Are performance reviews used in determining staff compensation?

Do you have a program for Peer Review?

Do you have a means for routine client feedback?

How is such feedback folded back into program?

Do you have a means for staff & volunteer feedback?

Do you have a program for Volunteer Recognition?

Do you have a program for Staff Recognition?

Organizational Culture

What is Organizational Culture?

**The customs, rituals, and values shared by the members of an organization that have to be accepted by new members.
**A system of shared assumptions, values and beliefs which govern how people behave in an organization. These shared values have a strong influence on people in the organization, and dictate how they dress, act and perform their jobs.

Can you define your organizational culture? Is it universally accepted and practiced?
How has it changed since opening? Intentional or unintentional?
Are all staff and volunteers thoroughly oriented to the organizational culture?
How would you rate communication at your clinic? Formal & Informal?
Board to Staff, Staff to Staff, Staff to Volunteers?
How has / is communication influenced at your clinic?

Organizational Culture

Team Building to Reinforce Culture

      Do you have staff meetings? How frequently?

      Business vs. Issues

      Does the leadership style match the Organizational Culture?

          Singular vs. Participatory

      Do you "team build"? How frequently?

Solid Base from the Past = Strong Building Into the Future

The ability of your clinic to grow and flourish is to:

Build Upon a Strong Base
Change is a Process
Recognize Change is Inevitable
Realize Successful Organizational Change is an Evolution, not a Revolution

During this times of change in the Healthcare Environment, it is important not to forget what got you here as well as what will sustain you in the future!! Past + Present = Future!!!

Questions, Comments

Martin Hiller, Senior Clinic Consultant
Empowering Church Health Outreach
Martyhiller@mac.com
216-408-2022
www.echoclinics.org