

Auditing Your Organization's Efficiency: Working Smarter, Not Harder

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Church Health

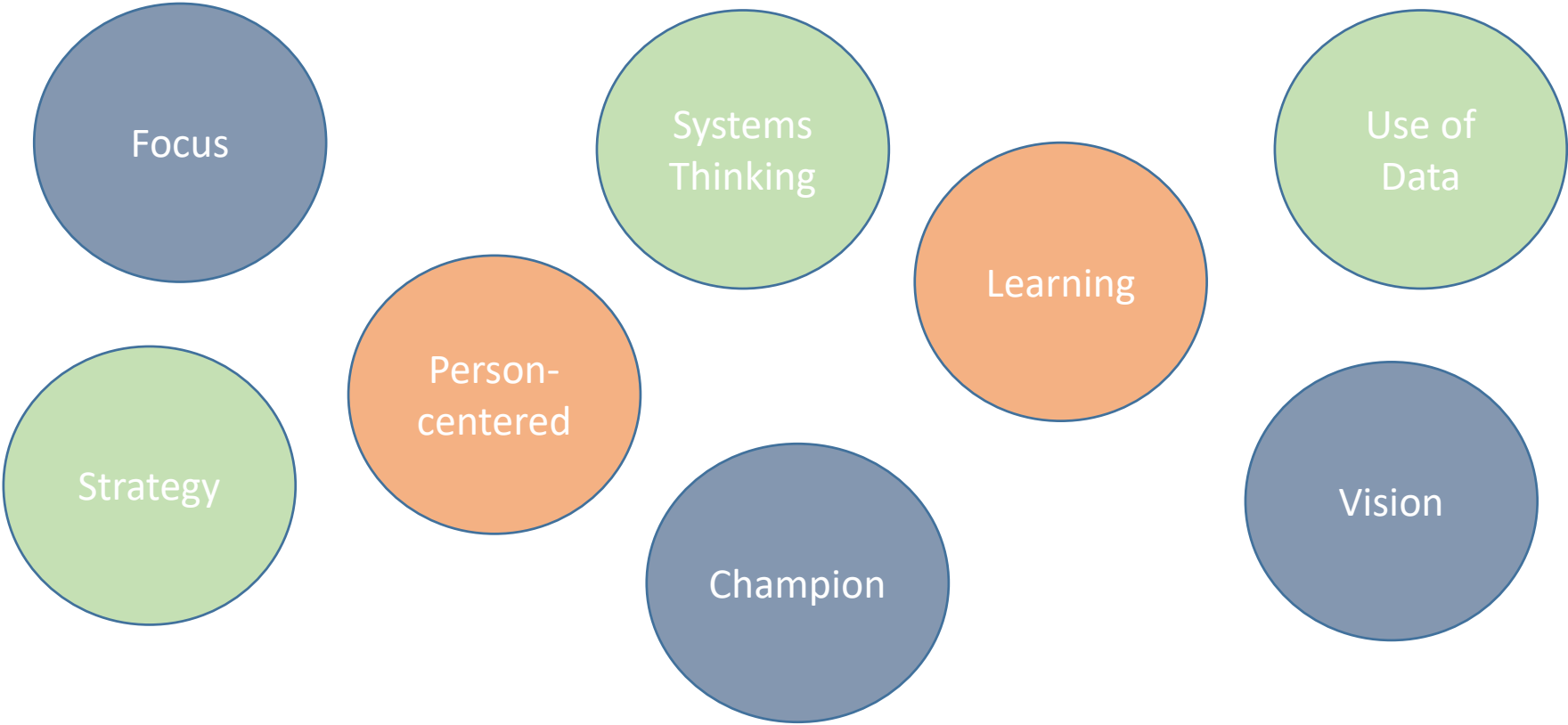
Memphis, TN



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LEADERSHIP



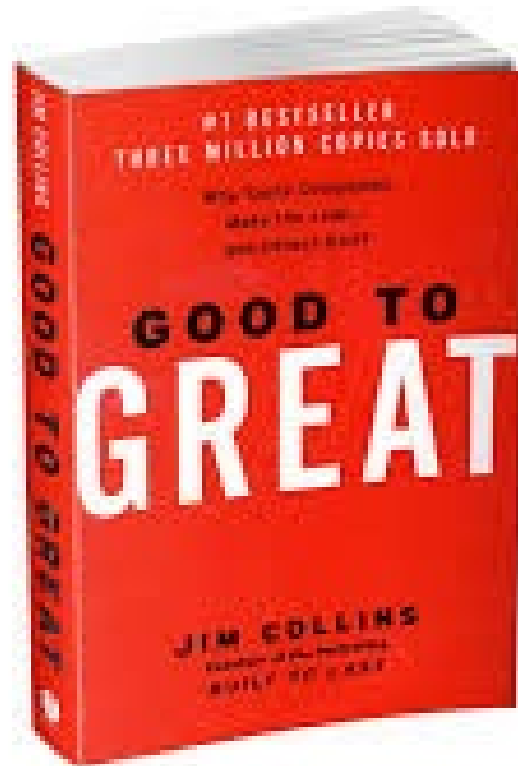


3 Key Learnings

- The 3 Circles
- Strategic decision-making for financial viability
- Articulating strategy and managing by fact



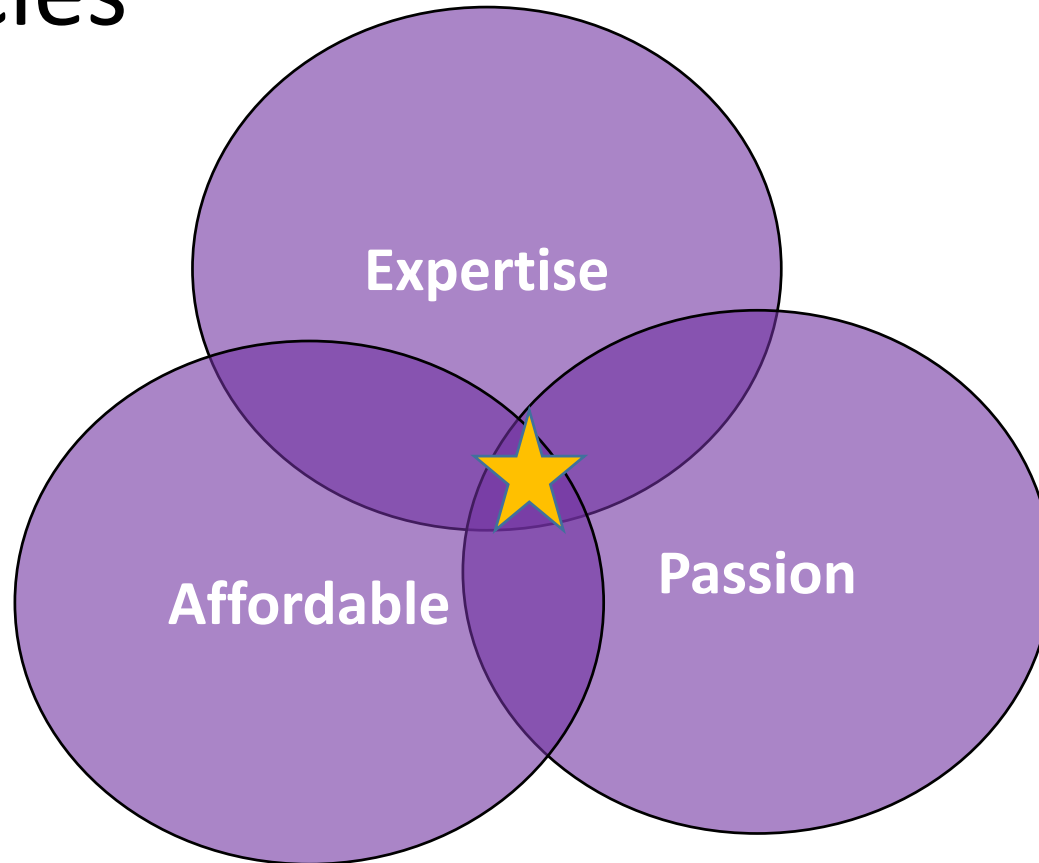
**Key Learning
#1**



***Good to Great* by Jim Collins**



The 3 Circles



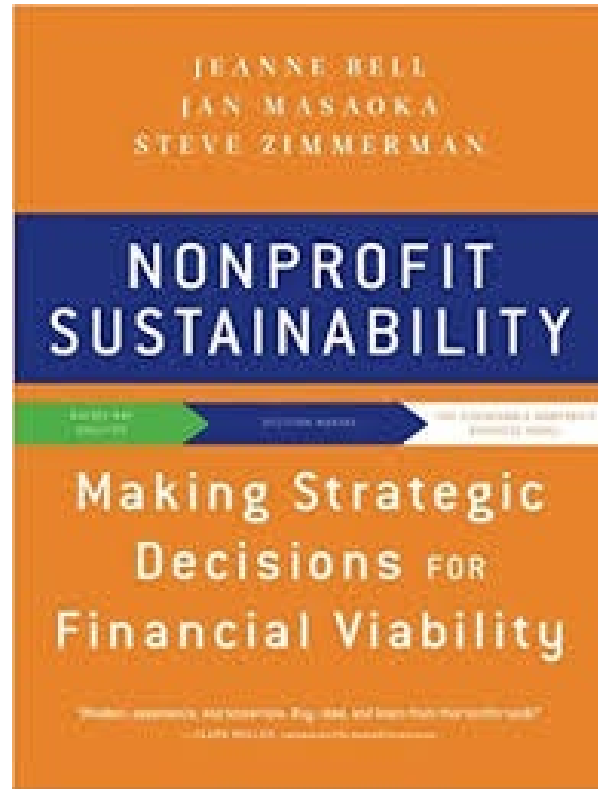
What's your single most important economic driver?

What "x" would have the greatest and most sustainable impact to your economic engine?

- Cost per visit
- Cost per patient
- For every \$1 donated, \$x services are provided (ROI)



Key Learning
#2



***Nonprofit Sustainability: Making Strategic Decisions for
Financial Viability***

By Jeanne Bell, Jan Masaoka, Steve Zimmerman



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Sustainability is an orientation.... not a destination

Financial sustainability

- The ability to generate resources to meet the needs of the present without compromising the future.

Programmatic sustainability

- The ability to develop, mature, and cycle out programs to be responsive to constituencies over time.



First step: Identify Service Lines

- Identify core activities (service lines)
 - groups of similar products/services/revenue-generating vehicles.
 - Includes fundraising activities.
 - May include volunteer solicitation and management.
- This is a process, bound to be full of debate, of which activities group together.



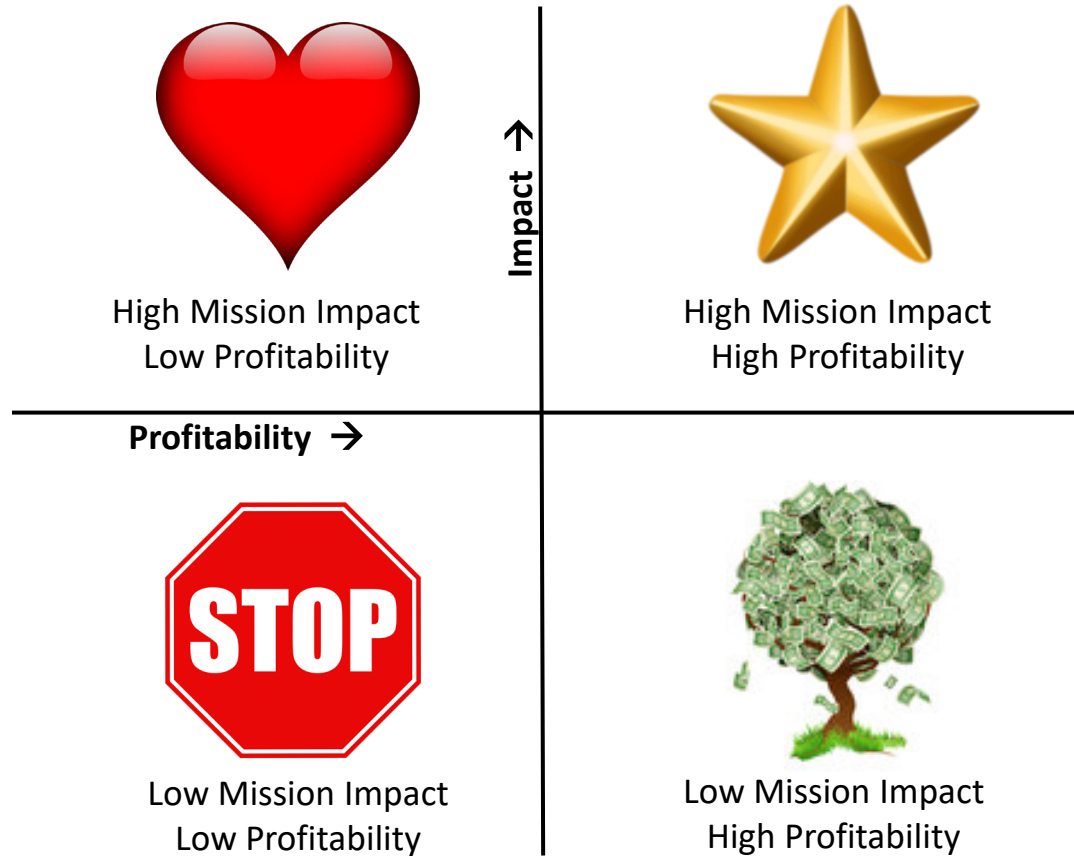
Second step:

Impact Strategy AND Revenue Strategy

- Impact Strategy: external effects of a service line
- Revenue Strategy: how a service line is financed
- Revenue = earned, grants/foundations, and contributions
- Every non-profit has a dual bottom line – impact and financial return.



Dual Bottom Line: Mission Impact and Financial Sustainability



Determine the full costs of a service line:

- Direct costs
- Fair share of common/shared costs
 - rent, supplies, utilities, shared staff time, etc.
- Fair share of administrative costs
 - accounting, human resources, staff who devote time to overseeing 100% of organization as a whole



Determining relative impact:

- Implicit assumption that everything is of value and everything drives toward the mission
- Some programs have a higher impact than others – can be an uncomfortable discussion
- May be able to get agreement quickly on where programs fall relative to impact

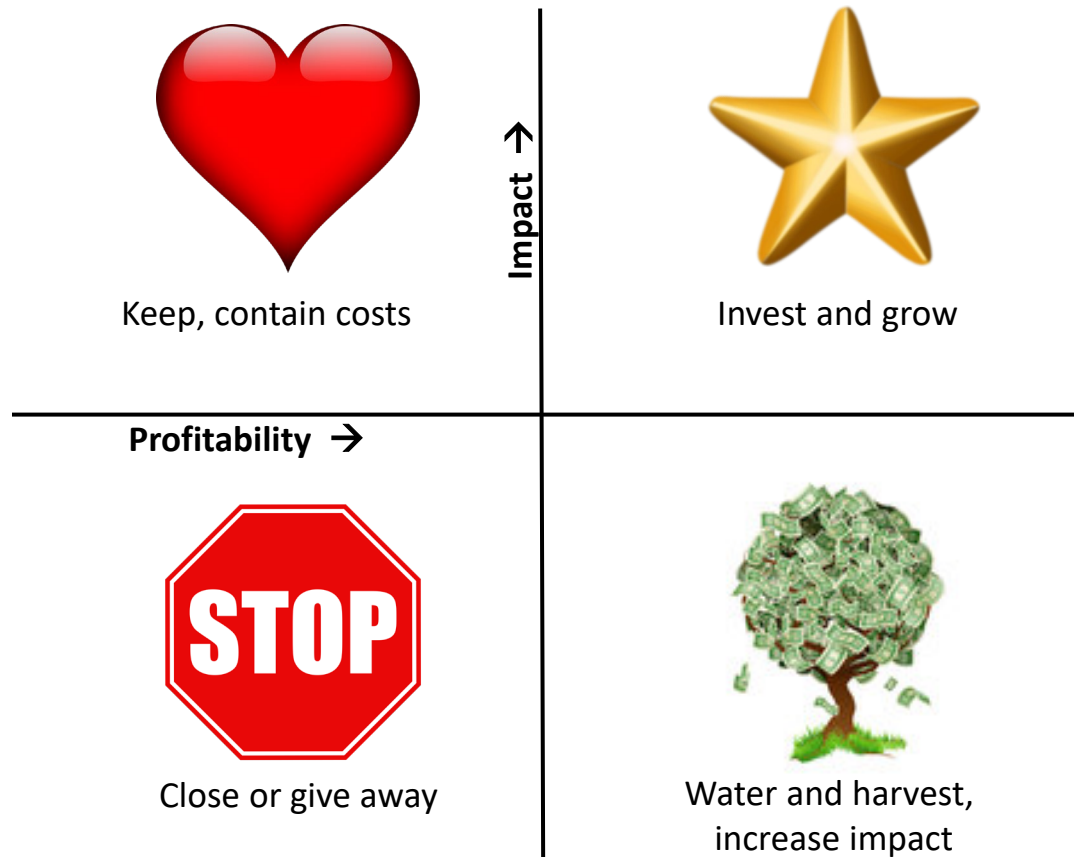


7 components of impact

- Alignment with Core Mission
- Excellence in execution
- Scale or volume
- Depth
- Filling an important gap
- Community building
- Leverage (the degree to which a program increases the impact of another program)



Strategic Imperatives: Adjustments Demanded for Sustainability



Key Learning

#3

Communicating strategy & Managing by fact



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Communicating Strategy

Why it's important that all staff know the strategy:

- Whole organization working towards common goal
- Gain insight from staff – helps shape future strategic planning
- Increased joy in the workplace
- Everyone is an ambassador of your strategy!



Key Components of 'How'

- Be clear & concise
- Define your terms
 - Avoid jargon
 - Tell staff how you plan to measure your achievement
- Articulate the 'Why'
- Relate it back to what they know
 - MVV
 - Core Competencies
 - Known strategic challenges
- Use SMART goals





Goal: To decrease the cost per patient at our clinic.

S – What processes at our clinic affect this number? What changes could be made to decrease this number?

M – What measures could influence our results? Are these numbers readily available?

A – What level of change is attainable? Do we have the staff / tech to achieve this goal?

R – How will I ensure that my aims impact my goal?

T – What time periods will I take my measurements? When will I evaluate my results?

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 "Bar Graph" icon by Scott Lewis, from the NounProject.com collection
 "Calendar", "People" and "Target" icons from the NounProject.com collection



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SMART Goal Setting

Strategic goal: To decrease the cost per patient at our clinic.

SMART goal:

We aim to decrease the cost per patient by 10% in the next six months by increasing the number of patients seen at our clinic through reducing our appointment cycle time by 5 minutes per appointment and recruiting new volunteer providers, thereby increasing the number of appointments available at our clinic.



Shared Strategic Plans

- Ensure staff understand the role they play in the success of your strategy
- Discuss how departmental strategies contribute to the org. strategy
- Encourage two way communication
- Visual Reminders
- Don't go away!



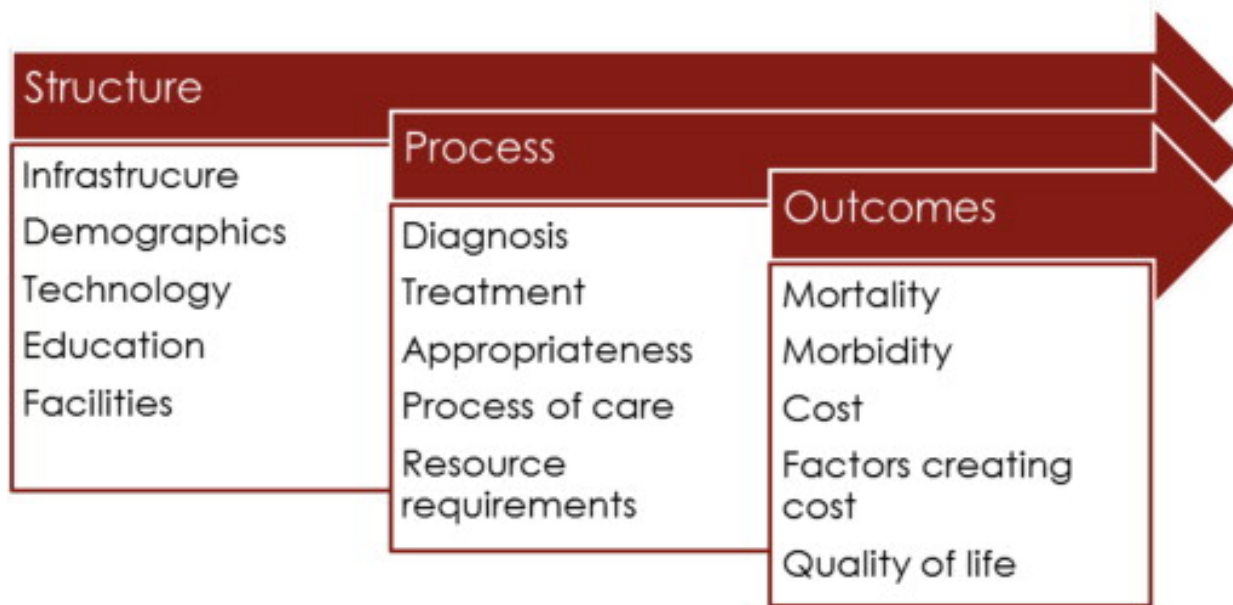
Managing by Fact

- How will you know you're achieving your goals?
- Tie strategy to outcomes
 - Intentional strategic planning should lend itself to outcomes
- Intentional measurement design
 - Begin with the end in mind
 - Match data to processes
 - What 'feels right' v. what's supported with data
- Changing the strategy
 - 3 data points is a trend



Where do you start?

Identify the type of measure that best fits your strategy



Donabedian model - Source: Agency for Healthcare Research and Quality



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Selecting Outcomes

- Every strategy needs an outcome measure
- Articulate your strategy
 - Make it S.M.A.R.T. (Strategy, Goals, Objectives)
- Can we measure this?
- Is the outcome measure specific and relevant to my strategy?
- Does it make sense?
 - Does it accurately measure your strategy?



Selecting Outcomes

- Is it important or meaningful to your stakeholders?
 - Donors
 - Board Member
 - Staff
 - Patients
- What does it tell others about you?



Outcome Measures

- Looks different to everyone
- Qualitative
- Quantitative
- Has to be measurable
- Set a outcome indicator or a goal
 - Number of
 - % of



Selecting Outcomes

- What others are measuring?
 - Other organizations
 - Health Dept.
 - Healthy People 2020
 - Tennessee Dept. of Health
 - CDC
 - CMS
 - FQHC - HEDIS



**Key Learning
#4**

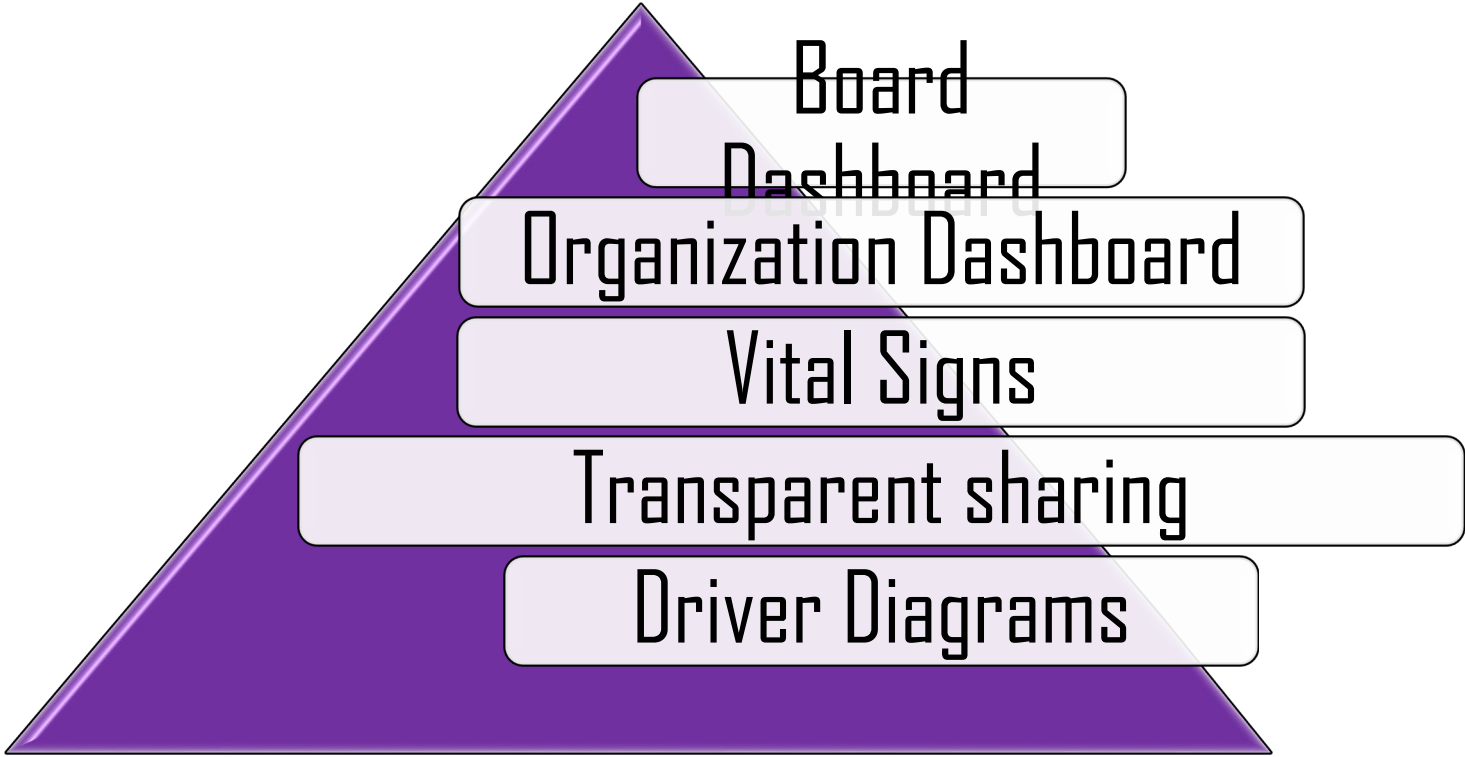
Culture Eats Strategy!



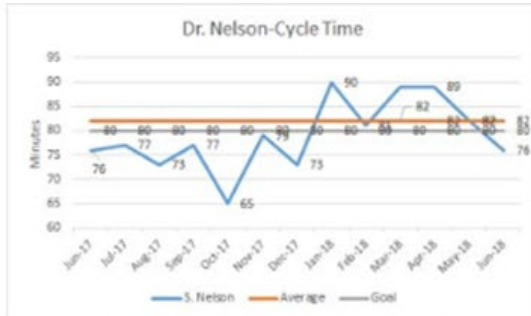
Building an Improvement Culture



QI Culture at Church Health



QI Culture at Church Health



The Cycle Time is the average amount of time each patient spends per visit, from the time the patient is checked in to the time they are checked out by the PSA staff. The Cycle Time goal is **80 minutes**.



Spanish Preferred reflects the percentage of your monthly encounters in which the patient reports that Spanish is their preferred language.



Third Next is a measure of the average number of days until your third next available Follow Up appointment in a given month. It is a reflection of patient access to care. The goal for Third Next is **14 days**.

New Patient Wait	
Wait Time (months)	0.55
Number of Patients on Wait List	246
New Patient Show Rate	88%



QI Culture at Church Health

The screenshot shows the Church Health website homepage. The top navigation bar includes the Church Health logo, a home icon, and menu items for CLINIC, NUTRITION, MOVEMENT, CHILDREN, FAITH & HEALTH, CALENDAR, LEARN, and ABOUT. A search icon is also present. On the right side, there is a 'DONATE' button with a phone icon and a notification badge showing '1'. Below the navigation is a large banner with a purple overlay. The banner features a group of diverse people smiling and working together. The main heading in the banner is 'Quality Improvement' in white text. Below the heading is the text: 'At Church Health, we strive to provide the best care, and we're always exploring new ways to improve our services.' At the bottom of the banner, there is a row of service categories: MEDICAL, PHARMACY, DENTAL, EYE CARE, PEDIATRICS, BEHAVIORAL HEALTH, and PHYSICAL THERAPY. Below this row, there are two more options: 'PATIENT AND FAMILY ADVISORY COUNCIL' and 'PATIENT PORTAL', with the latter highlighted in an orange box. On the far right edge of the banner, there is a vertical stack of social media icons for Facebook, Google+, Twitter, Pinterest, and a mobile app icon.

QI Culture at Church Health



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CLINIC

NUTRITION

MOVEMENT

CHILDREN

FAITH & HEALTH

CALENDAR

LEARN

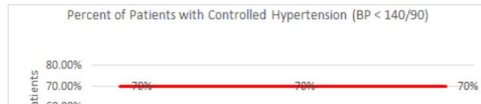
ABOUT



Take a look at how we are meeting our diabetes and hypertension goals:

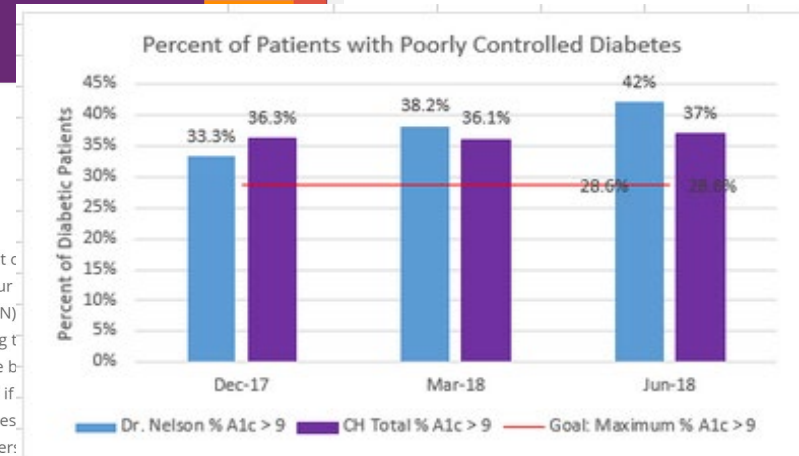
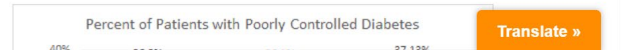
Diabetes Control Rate

Hemoglobin A1c is a test that indicates a patient's average level of blood sugar over the past 2 -3 months. It is important for patients with diabetes to have an A1c of 9 or less. We look to see how well our providers are working with patient to keep their A1c at 9 or lower. The below graph shows how our Church Health providers are doing.



Hypertension Control Rate

Blood Pressure (BP) is a measurement of the force of blood against the walls of the arteries as your blood flows through your body. Hypertension (HTN) is a condition in which the blood pressure is consistently too high. Blood pressure is read using two numbers: the systolic blood pressure (the top number) and diastolic BP (the bottom number). Hypertension is considered *controlled* if the systolic blood pressure is 140/90 or less. The below graph shows how our Church Health providers are doing.



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How to gain buy-in

- Transparency
- Communicating Consistently
- Allowing Outcomes to be **a part** of decision making
- Including it in daily work
- Attaching success to outcomes
- Attainable Challenge – engage staff



Perceived Barriers

- Time
- Technical Capabilities
- Too much jargon
- Fear of Numbers



Evaluating Outcome Measures

- Annually – Regular agreed upon time
 - Quarterly – Senior Leaders
 - Monthly - Managers
 - Weekly – Teams
- Shifting strategy and outcomes
- Accurately displaying your organization
 - Strengths
 - Improvement Areas
 - Gaps



Any final questions?

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