BEAM
Practice Improvement Network

The Webinar will Begin Shortly…

For technical issues, please chat Q&A to Evelyn Kleinbardt

For questions about content, please chat Q&A to Justine Lai

This webinar is being recorded and will be posted on www.ctacny.com.

Business Effectiveness Assessment Module (BEAM) Practice Improvement Network

June 21, 2013

Module 10:

Developing Personalized Indicators and Continuous Quality Improvement Processes

INTRODUCTIONS

Julie Gutowski, CASAC, LMHC

Managing Director of Clinical Operations, Spectrum Human Services

Agenda

- Recap from last week (Module 9)
  - Review Action Steps
  - Polling
- Developing Personalized Indicators and Continuous Quality Improvement Processes
  - Key Performance Indicators
  - Case Example (No Show Rate)
- Action Steps
- Wrap Up

RECAP FROM LAST WEEK

Julie Gutowski, CASAC, LMHC

Managing Director of Clinical Operations, Spectrum Human Services

Review Action Steps from Module 9

- Identify the primary problems from your benchmarking tool
- Develop an action plan for addressing those problems

What did you find?

Were you able to develop an action plan?

What barriers did you identify?

What solutions did you identify?

Polling Q#1

Did you log in alone or as a core team?*

A. Logged-in by myself
B. With one other person
C. More than 2 other people
D. More than 4 other people

**You may select more than one answer.*

Polling Q#2

Who is on the line?*

A. Finance
B. Clinic Leadership
C. Executive Leadership
D. Clinician
E. Professional Staff

**You may select more than one answer.*

Polling Q#3

Do you use Performance Indicators as part of your management practices?

A. Yes
B. Unsure
C. No
D. What are Performance Indicators?

MEASURING WHAT'S MEANINGFUL

Elizabeth Cleek, PsyD

VP of Program Design, Evaluation, & Systems Implementation, Institute For Community Living

Julie Gutowski, CASAC, LMHC

Managing Director of Clinical Operations, Spectrum Human Services

Recap – How Far Have We Come?

- Module 1: On the Road to Financial Planning
- Module 2: Orientation to Financial Benchmarking Tool
- Module 3: Indirect Costs
- Module 4: Direct Costs
- Module 5: Conversion + Analysis of CPT Weights
- Module 6: Effective Utilization of CPT Units
- Module 7: Analyzing Overall Model for Effective Decision-Making

Putting It Into Context

- **Module 9**: Using Your Financial Model to Develop a Plan for Fiscal Viability
  - What does your benchmarking tool tell you?
  - Problems and Solutions
  - Choosing a key focus and identifying immediate next steps (aka, "Action Plan")
- **Module 8a:** How To Develop a Strategic Plan, Part 1
  - What are the big picture changes you want to make?
  - How does it relate to your mission?
- **Module 8b:** How to Develop a Strategic Plan, Part 2
  - What very specific details do you need to figure out to make your strategic plan happen?
  - Goals/Benchmarks, Timeline, Resources

Why Set Quantitative Personalized Indicators?

- Data is non-negotiable
  - Data = Information
  - *Key:* Make sure your information is accurate!
    - Accurate
    - Complete
    - Timely
- Use Data as guideposts to inform next steps
  - Data helps to clarify
  - The information may surprise you!

Keeping Focused on Your Goals

Meaningful: What do you need to accomplish to keep your doors open?

- Identify Key Performance Indicators (KPIs)
  - KPIs help an organization define and measure progress toward its organizational goals.
- "KPIs Bridge Goals and Results"*
- Focus on How
  - Identify the steps you need to achieve your goal and use your KPIs to measure this work.

* Lorette, Kristie. "How Do I Develop Key Performance Indicators?"

Identifying Key Performance Indicators

- KPIs should be consistent with…
  - Mission
  - Clinic Goals
  - Strategic Plan
- Review Benchmarking Tool & Strategic Plan
  - Identify what data would tell you that progress is being made/not made.
  - Would this data flow from the work processes you've put in place?

Identifying Key Performance Indicators continued…

- Clarity and Consistency:
  - Clearly define the indicator
  - Identify the minimum number you must hit to achieve your goal at the end of the year
    - *Again – "**KPIs Bridge Goals and Results"***
    - Define Measurement Time-points
    - Within what timeline can you reasonably expect to see changes in your data?
- Assess Reasonableness:
  - Is it reasonable to collect, monitor and distribute reports on this indicator?
  - How will this information be used?

* Lorette, Kristie. "How Do I Develop Key Performance Indicators?"

To Summarize: Key Performance Indicators should be…

- Clearly defined
- Captured in a way that can be reported
- Provide information that is important to the strategic vision
- Representative of your clinical AND business objectives

Case Example
KPI: Decrease No Show Rate

- Step 1: Overview – *What Are We Trying To Achieve?*
- Step 2: Assessment – *What Can We Impact?*
- Step 3: Diagnostic – *Why Does The Problem Exist?*
- Step 4: Solution – *What Do We Target?*
- Step 5: Setting Goals – *What Do We Need to Achieve?*
- Step 6: Action Plan – *How Do We Achieve This?*
- Step 7: Identifying Indicators – *How will We Know Our Changes Are Working?*
- Step 8: Monitoring/Contingency Planning - *What Will We Do If Our Plan Works, or Doesn't Work?*

Case Example: Decrease NS Rate Cont.

- Step 1: Overview – *What Are We Trying To Achieve?*
  - Addressing deficit is key priority
  - Create strategic plan & engage required resources/stakeholders
- Step 2: Assessment – *What Can We Impact?*
  - Identified that the ratio of billable hrs to paid hours is a key sensitive variable that has HUGE impact on bottom line

Case Example: Decrease NS Rate Cont.

- Step 3: Diagnostic – *Why Does The Problem Exist?*
  - Low # of billable hours was directly related to 60% no show rate

- Step 4: Solution – *What Do We Target?*
  - Need to target no show rate as key issue within low # of billable hours

Case Example: Decrease NS Rate Cont.

- Step 5: Setting Goals – *What Do We Need to Achieve?*
  - If decrease no show rate to 10%, this will help increase revenue by 60%

- Step 6: Action Plan – *How Do We Achieve This?*
  - Identifying specific plan of action to implement attendance policy

Case Example: Decrease NS Rate Cont.

- Step 7: Identifying Indicators – *How Will We Know Our Changes Are Working?*
  - We will track no shows, which we will specifically define as any billable time left open.
  - We will run weekly reports with analyses on different kinds of no shows (cancelled by client, cancelled by therapist, no call) and review in supervision
- Step 8: Monitoring/Contingency Planning – *What Will We Do If Our Plan Works, or Doesn't Work?*

Love Your Data!

- Data is your friend
- Excel is your friend
- Instant, actionable information

"You Change What You Watch" aka The Hawthorne Effect

- I.Piccone, 2010

How Do You Communicate Your Data?

- Data is a regular part of your clinic management practice!
- Regular distribution of reports
- Regular part of supervision
- Positive acknowledgement of superstars as identified by the data
- Consistency, consistency, consistency

ACTION STEPS & WRAPPING UP

Elizabeth Cleek, PsyD
VP of Program Design, Evaluation, & Systems Implementation, Institute For Community Living

Polling Q#4

Do You Feel Confident that You Can Implement Key Performance Indicators into your Management Practice?*

A. Yes
B. No
C. Not Sure

* *If you answered no or unsure, please respond to the survey afterwards on what further information you would like so we can plan trainings accordingly!*

Polling Q#5

How Likely Are You to Develop Key Performance Indicators to Inform Your Management Practices?

A. Likely!
B. Not sure
C. Not Likely
D. I already do this.

Action Steps

- Step 1: Identify the results you expect
- Step 2: Establish the numbers you need to reach your goals
- Step 3: Identify the progress that has occurred so far
- Step 4: Determine the percentage of change that has occurred within each area of review
- Step 5: Establish the frequency of reviewing these indicators
- Step 6: Review the indicators as scheduled

Develop and send any questions you have to CTAC so they can be answered in the office hours

  – Please submit via the survey (http://nyu.qualtrics.com/SE/?SID=SV_bw1AkaN9yDFQ6AR)

Source: How Do I Develop Key Performance Indicators?
by Kristie Lorette, Demand Media

Resources

Anne, Cassidy. "Economist Steven Levitt On Why Data Needs Stories." *Fast Co.Create*. Mansueto Ventures, LLC., n.d. Web. 18 June 2013.

Link: http://www.fastcocreate.com/1683190/economist-steven-levitt-on-why-data-needs-stories

Kramer, Kirk & Matthews, Carole. "Four Actions Nonprofit Leaders Can Take To Transform Organizational Culture." The Bridgespan Group, n.d. Web. 20 June 2013.

Link: http://www.bridgespan.org/Publications-and-Tools/Organizational-Effectiveness/Four-Actions-Nonprofit-Leaders-Can-Take-to-Transfo.aspx#.UcL6POeKKyc

Kristie, Lorette. "How Do I Develop Key Performance Indicators?" *Small Business by Demand Media*. Hearst Communications, Inc., n.d. Web. 18 June 2013.

Link: http://smallbusiness.chron.com/develop-key-performance-indicators-4676.html

Upcoming BEAM Programming*

Module **10: Developing Personalized Indicators and Continuous Quality Improvement Processes**	6/21/13, 12 – 1 PM
Module **10 Office Hours: Developing Personalized Indicators and Continuous Quality Improvement Processes**	6/28/13 12-1 PM
Module **11: Wrapping Up & Reporting Back**	7/12, 13, 12-1 PM

**Registration links can be found on the BEAM Resource Page on ctacny.com*

NEW Upcoming Dates for Supplemental Trainings

Topic	Date
Facilitating Successful Team Meetings	*Friday, July 26, 12 – 1 PM*
Tools & Strategies for Managing Productivity Goals	*Friday, August 2nd, 12 -1 PM*

Data Submission

Email Justine Lai (Jlai@iclinic.net) if you have yet to submit your data!

Email Data to: BEAM@ccsi.org

Financial Benchmarking Tool is available for download at www.ctacny.com

Contact us

Submit questions for office hours using the following link:
http://nyu.qualtrics.com/SE/?SID=SV_bw1AkaN9yDFQ6AR

Justine Lai

CTAC Business Practices Project Manager

Email: JLai@iclINC.net

Phone: 212.385.3030
x 16009

**Email Preferred*

www.ctacny.com

Thank You!

Your feedback is appreciated—Please fill out the survey afterwards…