

Executing Your Plan

**FQHC CEO Bootcamp
Session #12**



Today's Focus



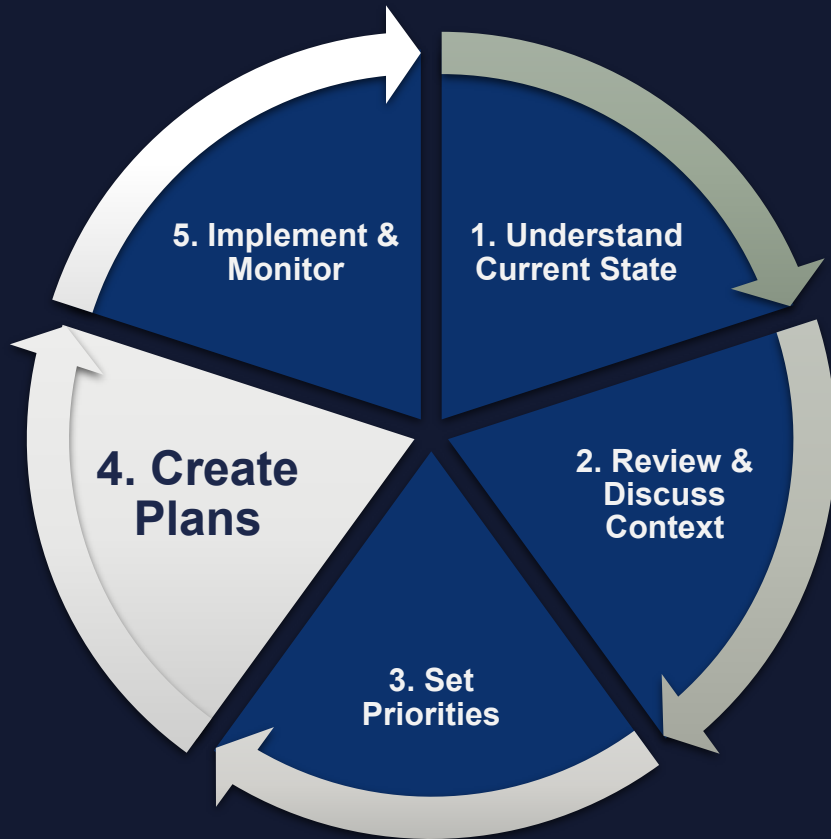
Creating Plans



Change management



Implementing and
monitoring strategic plans



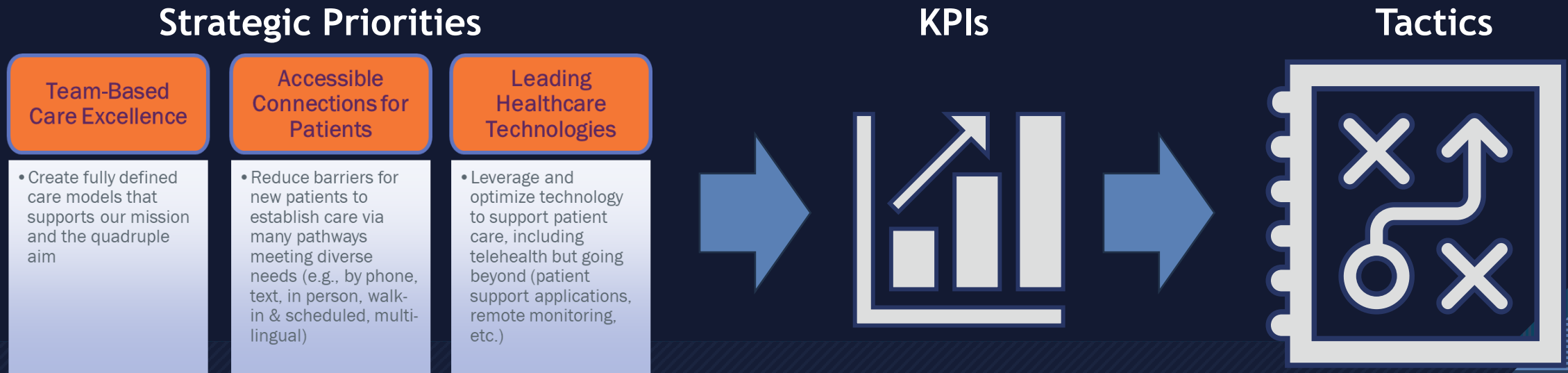
Create Plans

How will we get where we want to go?

Implementation Planning

Once you create a set of strategic priorities or add a new one:

- ❑ Link them to clear KPIs – both process and outcome measures
- ❑ Create a plan with tactics that:
 - Focus on annual and quarterly milestones
 - SMART tactics: Specific, Measurable, Attainable, Realistic and Time-Based
 - One person responsible for each tactic



Your KPIs should in combination represent a balance of often competing measures

Metrics



- ▶ 90 Days Cash On Hand



- ▶ 50,000 Encounters
- ▶ +30 FTEs



- ▶ Quality: Achieve Tier 1 for UDS controlled hypertension & diabetes



- ▶ 45% Of patients covered by Medicaid



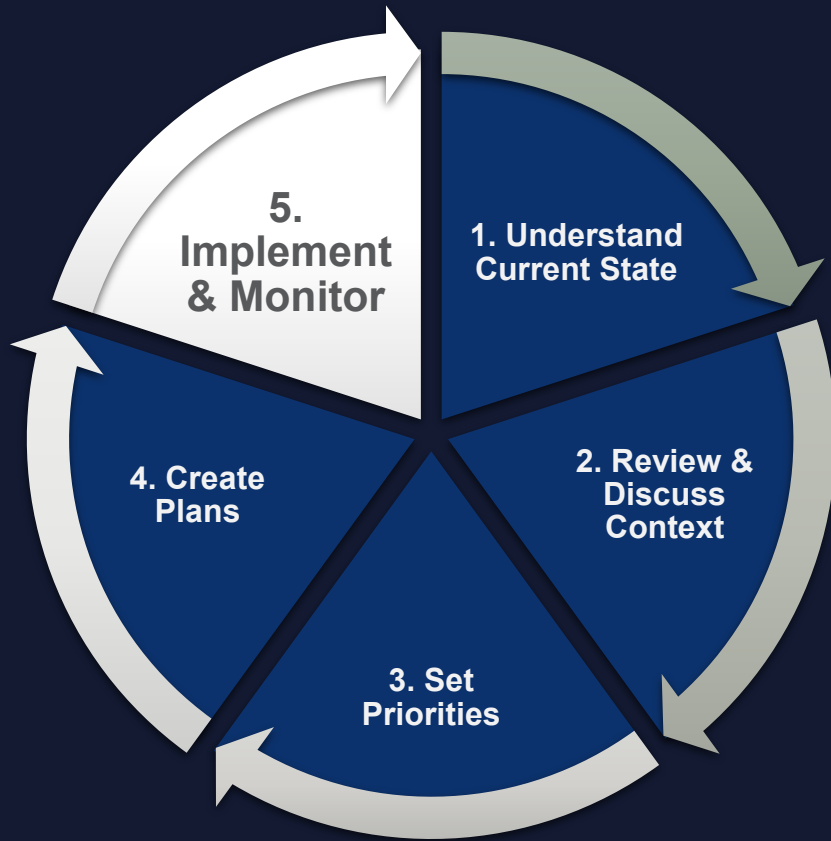
- ▶ Patient Satisfaction: 85% would Recommend to Family and friends

Example Priority: Excel at Population Health

Objectives	• Create fully defined population health management methods that supports our mission and the quadruple aim
------------	---

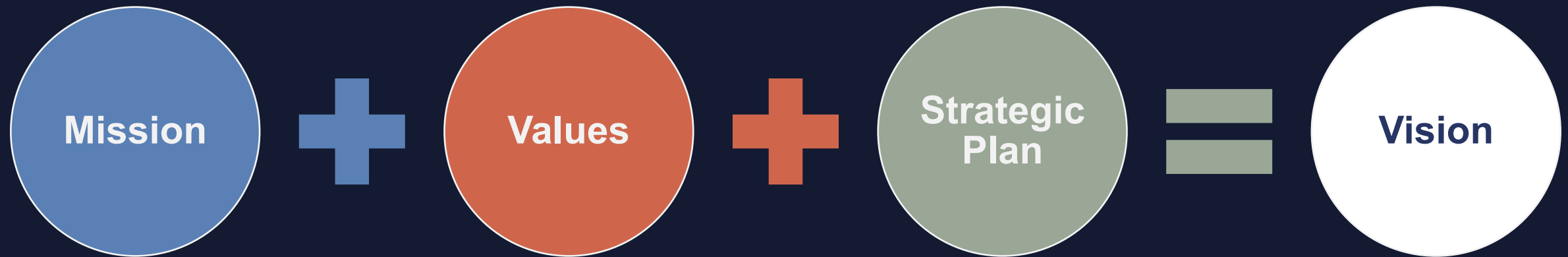
KPI (Outcome Measures)	Target for 2025	2026 Target	Current Result
% of managed care assigned patients with a visit	10% Increase	20% Increase	2% Decline
% of chronic care UDS measures meeting goal	6 of 9	7 of 9	4 of 9
All care coordinators and clinical support staff trained on new pop health workflow	75%	100%	25%

Tactic	SL or Dept Owner(s)	Timeline / Milestones	Status
Create standard, repeatable pathway to identify and reengage patients with chronic care	Care Management Dept	Hire engagement coordinator by June 2025 Pilot new engagement process with clinic ABC by EOY 2025	In process
Create new metric to track ratio of non-traditional patient interactions to office visits	Primary Care	Define metric and data sources by July 2025. Validate metric with pilot clinics by September 2025. Incorporate into monthly performance dashboard by EOY 2025	Not started
Develop standardized population health stratification and intervention framework (risk tiers, care models, and escalation pathways)	Primary Care	Define population risk tiers and attribution logic by August 2025. Align evidence-based interventions to each tier by October 2025. Pilot framework with two populations (e.g., diabetes, hypertension) by EOY 2025	Not started



Implement & Monitor

How will we know we are making progress?





**Key: Embed the story
of your priorities in a
multitude of
communications**

Tying the numbers to the vision

Numbers

- Increase pediatric encounters by 2,000
- Increase encounters per day per provider
- Cut expenses

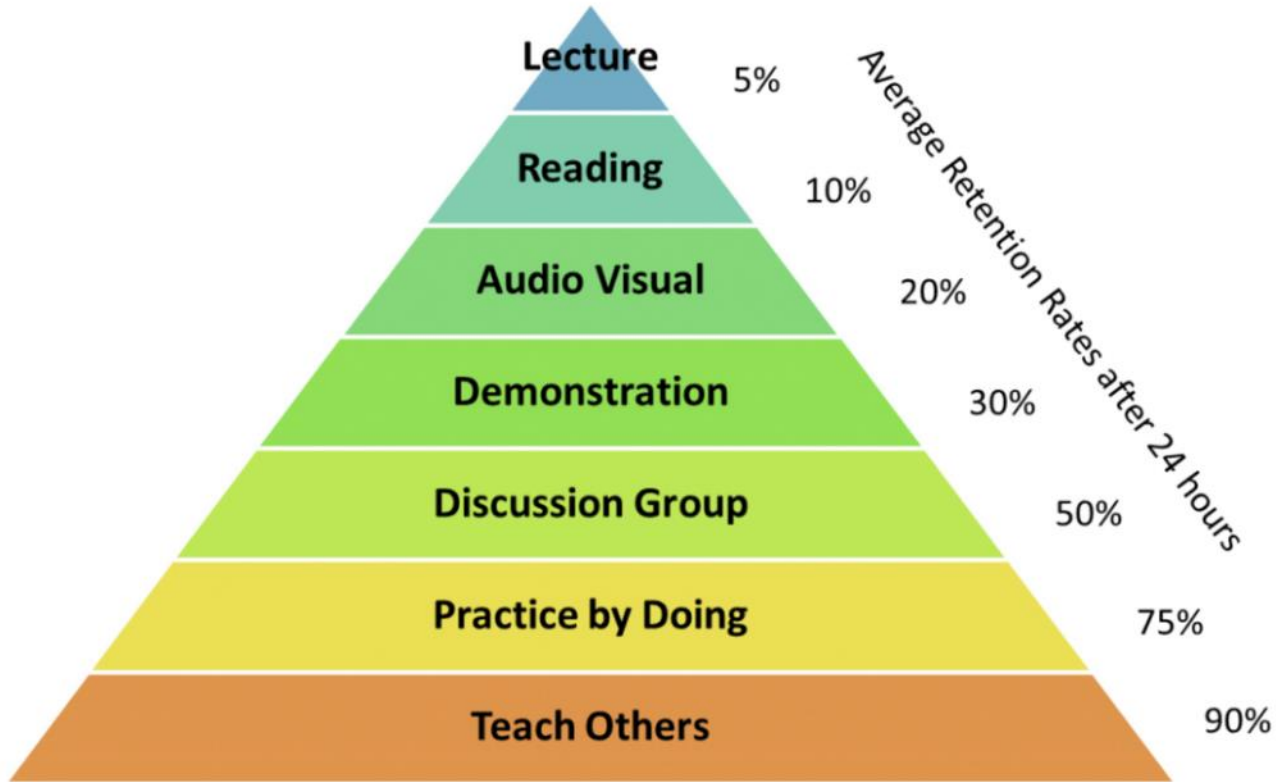


Vision

- 2,000 – 4,000 additional parents will rest easy because their child has had health care
- By addressing provider obstacles and increasing MA staffing, provider satisfaction increases and more patients receive healthcare
- Create a legacy for their local community by leveraging their resources as efficiently as possible



The Learning Pyramid



Source: National Training Laboratories, Bethel Maine

How will
staff
remember
your CHC's
priorities?

Ongoing Monitoring & Evaluation

- Meet quarterly with leadership team to review dashboard
 - Assign clear ownership to update dashboard
 - Compare metrics to baseline
 - Determine which goals and tactics have been achieved during the quarter
 - The owner of each tactic should feel peer pressure to stay on track
- Consider quarterly goal setting (Covey's "Big Rocks")
 - Create new 90-day goals that support the longer-term tactics and priorities
 - Keep them S.M.A.R.T
 - Are they S.M.A.R.T? Check again

Create a dashboard for your plan

#1 Transform Technological Capabilities

KPI (Process & Outcome Measures)	Target for 5/23	Current
# of e-enabled visits or interactions (telehealth, eConsult, etc.)	METRIC TBD	
# of appointments self-scheduled (by SL, TH v In-person)	METRIC TBD	
Tactics	Status	
Create metric to understand patient use of digital front doors	Not yet started	
Investigate comprehensive solution to for a CHC-branded mobile app	Awaiting vendor response	
Investigate use of technology by patient populations	Not yet started	

#2 Meaningfully Address Health Equity

KPI (Process & Outcome Measures)	Target for 5/23	Current
Total # of HCH patients	TARGET TBD	590
Staff turnover and retention for BIPOC staff	<20%	26%
BOD composition reflects community served	Reflects Community	Yes
Tactics	Status	
Outreach to diverse communities for hiring and apprenticeships	Plan in place and underway	
Evaluate policies that may be creating barriers to care for unhoused patients	Starting soon	
Identify patient population metrics to identify health disparities	Initial disparities identified	
Continue implementing internal DEIB program	Work is underway	

#3 Expand Access for New Patients

KPI (Process & Outcome Measures)	Target for 5/23	Current
Percentage of new patients to total visits (primary care only)	METRIC TBD	
Number of new patients seen (all SLs)	TARGET TBD	300/mo
Encounters per day	19	17
Use of non-traditional appointments and contacts	METRIC TBD	
Utilization of panel capacity (primary care, dental, BH)	TARGET TBD	80%
Tactics	Status	
Standardize schedule templates across providers	Now rolling out sched ap	
Define panel size/caseload goals based on patient complexity	Not yet started	
Continue work to enable self-scheduling across SLs	Plan to add some by EOY	

#4 Implement World Class Population Health Management

KPI (Process & Outcome Measures)	Target for 5/23	Current
% of managed care assigned patients with a medical visit	65%	59%
% of hypertension patients in control	65%	57%
Well child up to date	METRIC TBD	
Tactics	Status	
Define clinical pathways for each major chronic condition care (e.g., diabetes, hypertension)	Piloting now	
Increase frequency of patient surveys	Underway	
Create new UDS dashboard for real-time information	Discussion underway	

CEO role in project and team oversight

- Projects and standing teams must be engaged to implement priorities
- These teams and projects can proliferate in growing organizations
- Cross-functional collaboration is critical, but time consuming
- CEOs must balance micromanaging with making sure resources are deployed efficiently towards strategic goals
- Enforce “One-page bureaucracy” for:
 - Standing Team and Project Charters
 - Strategic Plan Summary
 - Strategic Plan Status
 - Large Meeting Agendas, Minutes & Action Items



**Key: One-Page
Bureaucracy**



***Key: A commonly
understood project
oversight and
management approach is
a foundation for success***

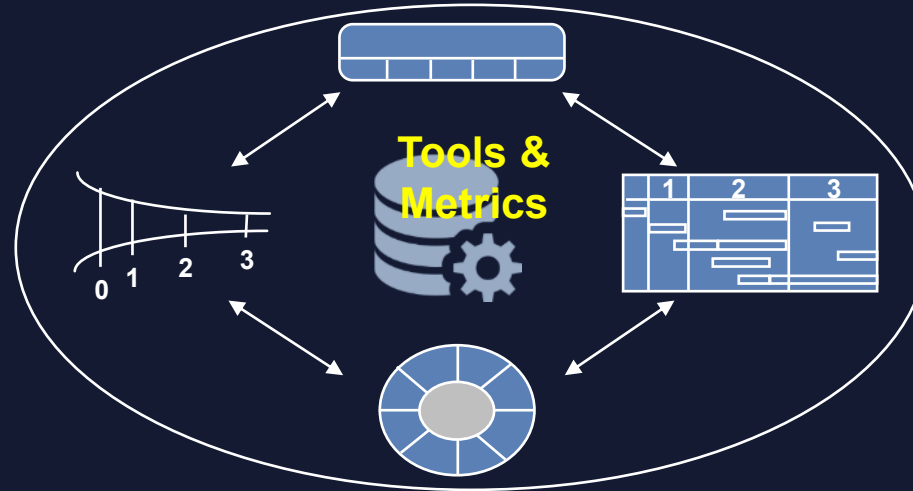
Project excellence requires a common system to manage both individual projects and the pipeline of projects

Leadership Team

- Clearly defined decision makers
- Effective resource allocation
- Management of the project pipeline

Phase Review Process

- Event-driven
- Mission & business perspective
- Explicit deliverables
- Project contracts



Common Milestones

- Roadmap for projects
- Consistent terminology
- Cross-functional linkages

Core Teams

- Small, cross-functional teams representing entire project
- Effective communication and coordination
- Project management support when appropriate
- Project focus with clear responsibility and authority

ONE-PAGE PROJECT CHARTER TEMPLATE

PROJECT NAME	PROJECT MANAGER	PROJECT SPONSOR	
EMAIL	PHONE	ORGANIZATIONAL UNIT	
	000-000-0000		
ESTIMATED COSTS	EXPECTED SAVINGS	EXPECTED START DATE	EXPECTED COMPLETION
\$0	\$0	00/00/0000	00/00/0000

PROJECT OVERVIEW

PROBLEM OR ISSUE	
PURPOSE OF PROJECT	
BUSINESS CASE	
GOALS / METRICS	
EXPECTED DELIVERABLES	

PROJECT SCOPE

WITHIN SCOPE	
OUTSIDE OF SCOPE	

TENTATIVE SCHEDULE

KEY MILESTONE	START	FINISH
Form Project Team / Preliminary Review / Scope	00/00/0000	00/00/0000
Finalize Project Plan / Charter / Kick Off	00/00/0000	00/00/0000
Define Phase	00/00/0000	00/00/0000
Measurement Phase	00/00/0000	00/00/0000
Analysis Phase	00/00/0000	00/00/0000
Improvement Phase	00/00/0000	00/00/0000
Control Phase	00/00/0000	00/00/0000
Project Summary Report and Close Out	00/00/0000	00/00/0000

Project Charter

The One-Page Bureaucracy Challenge

Step 1 – Pick a real initiative (2 min)

- Choose a project or priority that matters this year (e.g., access expansion, workforce stabilization, population health, tech rollout)

Step 2 – Complete a one-pager by answering each item below (5 min)

1. Problem / Opportunity - What are we trying to solve or improve?
2. Objective - What does success look like in plain language?
3. What's IN / What's OUT - What we are doing, and explicitly *not* doing?
4. 90-Day Milestones (3 max) What must be true by the end of this quarter?
5. Accountability Sponsor: _____ Single owner: _____
6. “Done” Metric - One number or outcome that defines success

Step 3 – Two- or three-person share out. With partner(s), discuss:(10 min)

- Besides the sponsor and owner, who else will need to support?
- Should this be implemented as an individual responsibility, a department priority, or a cross-functional project?
- How might this work fail without CEO attention?

Step 4 – Group discussion (5 min)

- Key takeaways?



Will your initiative succeed?

Change Management in 2 Quotes

“People don’t resist change;
they resist being changed.”

— Peter Senge

“If you want to build a ship, don’t drum
up the people to gather wood, divide the
work, and give orders.

Instead, teach them to yearn for the
vast and endless sea.”

— Antoine de Saint-Exupéry

Discussion

What examples have you seen of priorities or change efforts that have not gone as planned?

What could have been done differently?

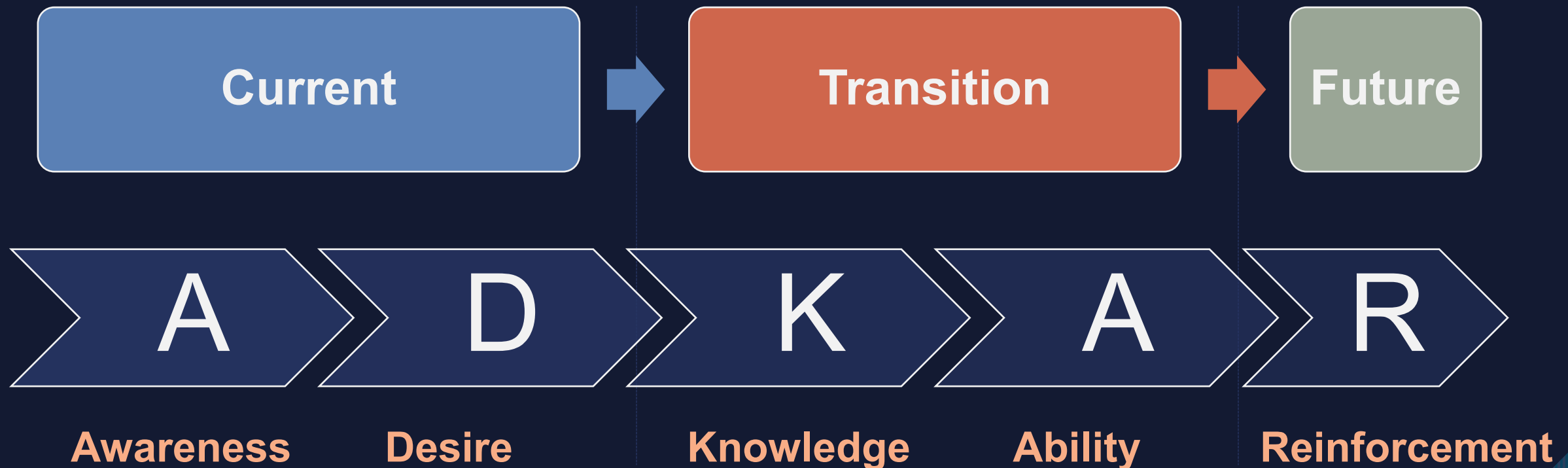
Basic change management can suffice for small efforts

Change Management Checklist

- ❑ Start with the “why”
 - Ask for input and make sure you can clearly articulate it to those affected by the change
- ❑ Document the change
 - Update training materials, workflows, procedures, new hire checklists, or intranet content
- ❑ Communicate the change in multiple ways (at least 3 of those below)
 - Always start with the “why”
 - In team meeting(s) or huddle(s)
 - By email
 - 1-on-1
 - In training
- ❑ Check in on the change right after and later on
 - Set a reminder to check back in a few weeks later and ask staff how things are going
 - Repeat communication steps as needed
 - Refine the change and repeat the cycle as needed

Big changes require focused efforts to bring staff along

States of Change and the ADKAR Phases



Factors influencing ADKAR elements



Awareness of the need for change

One's view of the current state
Perception of problems
Credibility of the sender of awareness messages
Circulation of misinformation or rumors



Desire to support and participate in the change

Nature and impact of the change
Perception that one needs to change
Personal motivations
Organizational and environmental context



Knowledge of how to change

Current knowledge base of an individual
Capability to gain new knowledge
Existence of the required knowledge
Resources available for education and training



Ability to implement required skills and behaviors

Psychological blocks
Physical abilities
Intellectual capability
Time availability
Resources to support ability development



Reinforcement to sustain the change

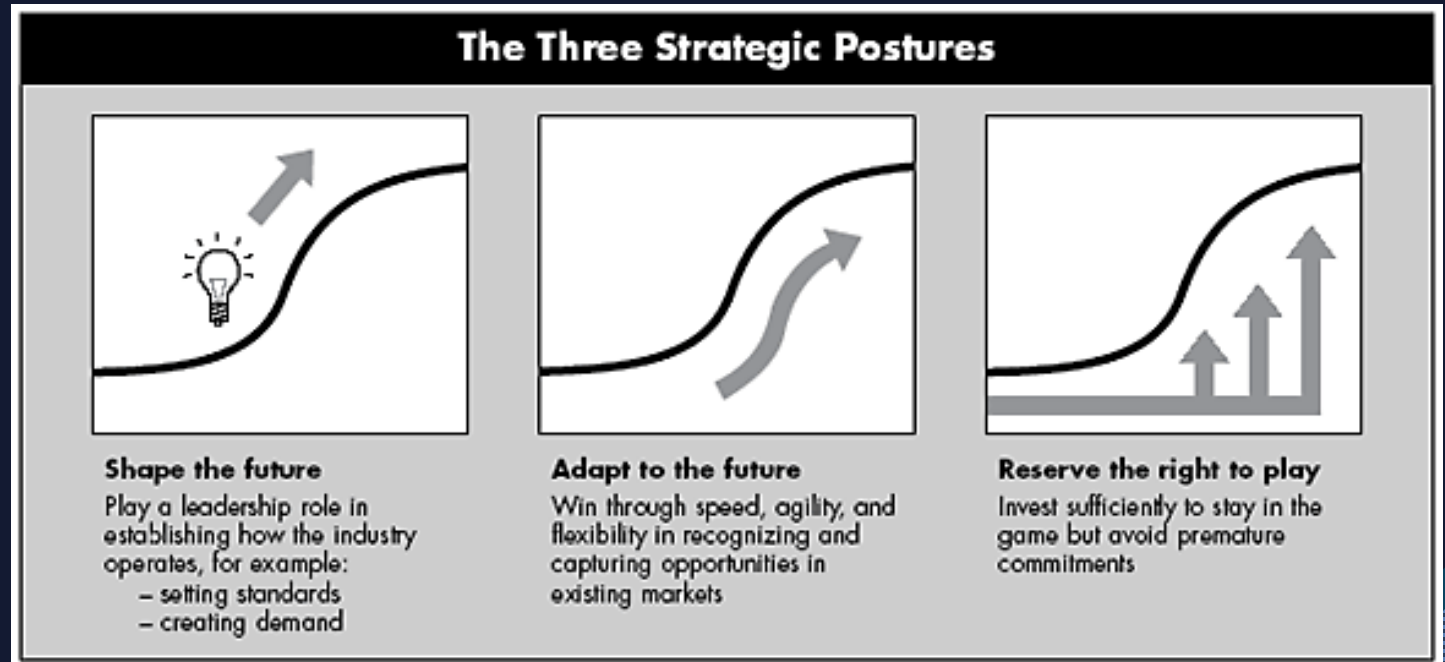
Degree of meaningfulness of the reinforcement
Personal specificity
Link between reinforcement and accomplishments
Absence of negative consequences
Accountability system for ongoing reinforcement



Discussion:
Reacting to
curve balls

When the curve balls come in and... ...appear to add a new priority

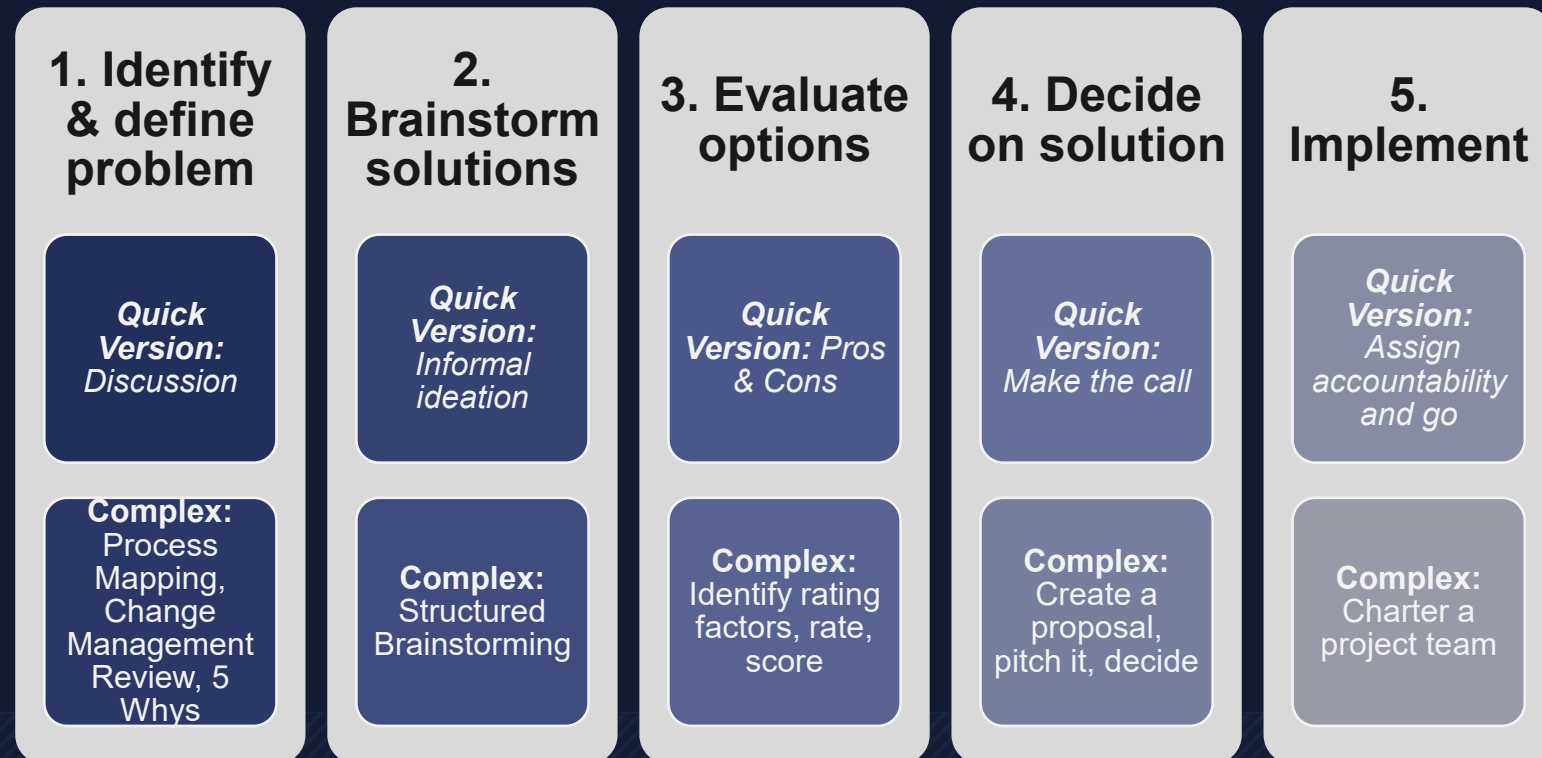
- First, vet against your existing plan, mission, and vision
- Next, decide on timing. Do you need to act now, at a quarterly plan review, or annual review
- Then, determine posture
- If action is warranted, avoid a pile-on of work:
 - Consider pausing an existing priority
 - Review resources needed to respond



When the curve balls come in and... ...a priority is not achieving expected results

- First, don't expect all your priority work to go as planned. Transformative work should include risky interventions
- Consider whether a more iterative approach (e.g., Agile project management, PDSAs, Kaizen events) is needed
- Consider a workshop or retreat for the project team to problem solve
- If needed, discuss retiring priority at next quarterly check-in

5 Steps of Problem Solving



When the curve balls come in and... ...a priority is not even really getting started

- First address the basics of individual performance of the person leading the work
 - Do they have the buy-in, understanding, and capacity to do the work?
- Is the team aligned?
 - Do they have a realistic and specific implementation plan?
 - Do they have the training needed to lead the change?
- Are other departments supporting as needed?
 - As an organizational priority, resources should be allocated across the organization
- In each aspect above, your communication, setting of clear expectations, and allocating resources may be needed

Questions?



Closing Thoughts

- What's one key learning about yourself, your health center, or your role?
- Would you be interested in 1:1 or small cohort monthly ?
- Evaluation – in what ways would you improve this Bootcamp?

CLC's Service Line Up

- ▶ Interim CFO Services
- ▶ Interim COO/CEO Services
- ▶ C-Suite Coaching
- ▶ Strategic Advisory Services
- ▶ Interim Controller Services
- ▶ Operational Assessment
- ▶ Financial Management
- ▶ Revenue Cycle Management
- ▶ Sliding Fee Discount Program Development
- ▶ Cost-Based Fee Schedule
- ▶ Medicare Cost Report
- ▶ Medicaid Cost Report
- ▶ FQHC Look-Alike Designation
- ▶ Outsourced Billing Services
- ▶ Bookkeeping Services
- ▶ Month-End Support
- ▶ Federal Financial Report
- ▶ Audit Support
- ▶ Insurance Contract Review
- ▶ Business Analysis
- ▶ Project Feasibility
- ▶ FQHC Program Compliance
- ▶ Grant Writing
- ▶ Federal Grant Applications (SAC, NCC, other HRSA, etc.)
- ▶ Change in Scope
- ▶ UDS Report
- ▶ Needs Assessment
- ▶ Community Surveying
- ▶ Policy Review and Development
- ▶ Board Training
- ▶ Strategic Planning
- ▶ HRSA Site Visit Preparation
- ▶ 340B Pharmacy
- ▶ FTCA Application
- ▶ Budget Development
- ▶ Residency Development

obrigado

Dank U

Merci

mahalo

Köszí

спасибо

Grazie

Thank
you

mawuuru

Takk

Gracias

Dziękuję

Děkuju

danke

Kiitos