Achieving Strategic Results

Pete Knox
Executive Vice President
Chief Learning & Innovation Officer

bellin health

May 2012
Bellin Health is a community-owned not-for-profit organization responsible for the physical and emotional health of people living in Northeast Wisconsin and the Upper Peninsula of Michigan.

Directly, and in partnership with communities, employers, schools, and government officials, we guide individuals and families in their lifelong journey toward optimal health. We are committed to providing safe, reliable, cost-effective total health solutions with respect and compassion. Our innovative work will impact healthcare delivery in our region, as well as throughout the world.
The people in our region will be the healthiest in the nation.
Objective 1: Patient, Family & Customer-Centered Organization

Objective 2: Engaged Staff and Partners

Objective 3: Improved Health of the Population

Objective 4: Growth & Prosperity
Serving a market of 600,000 people

**Bellin Hospital**, a 220-bed community hospital with proven excellence in heart and vascular care; orthopedics and sports medicine; family programs and services; and minimally invasive procedures including robotic surgery

**Oconto Hospital & Medical Center**, a critical-access hospital in Oconto

**Bellin Medical Group**, a 93-member primary care group with 34 clinic sites and proven excellence in disease management and wellness care

**Physician Partners, Ltd**, more than 170 independent specialty physicians

**NorthReach**, a 26-member primary care group managed in partnership with Bay Area Medical Center in Marinette

**Bellin Orthopedic Surgery Center**, an ambulatory orthopedic surgery center merged in partnership with a local orthopedic physician practice

**Bellin Psychiatric Center**, a dominant provider of in- and outpatient behavioral health services

**Bellin College** with baccalaureate and masters degree programs to educate and train nurses and radiologic technologists

**Unity Hospice**, providing hospice and palliative care services
Healthcare At A Crossroads

A great chasm to cross but many not capable of making the journey.
1. How will I prioritize the various cost and quality imperatives my organization will need to accomplish to thrive?

2. How will I reach beyond the walls of my organization. To public health authorities, non profit groups and others, and engage these key community partners in helping to improve the health of patient population my organization serves.

3. How will I move my organization toward true clinician alignment and integrated care delivery?

4. What does “accountable care” mean for my organization? Are market reform forces moving toward population health broadly, or should we focus on creating integrated care models for certain populations?

5. How will I effectively lead my organization through the transition form volume based payment model we operate under now to the value based payment model that is coming?

_Huron Healthcare Report_
Capabilities to Make the Journey
Obstacles to Executing Strategy

- Resistance to change
- Silos or units with competing agendas
- Lack of clear & decisive leadership; actions inconsistent with strategy
- Everyone too busy; lack of time; resource constraints
- Lack of accountability or follow-through; inability to measure impact
- Too focused on short-term results
- Making it meaningful to frontline; translating strategy to execution; aligning jobs to strategy
- Poor communication of strategy

POPULARITY OF RESPONSE
70% FAILURE RATE

Institute for Healthcare Improvement
**Assessment**

**Strategic Clarity & Production System Design**

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<thead>
<tr>
<th>STRATEGIC CLARITY</th>
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<tr>
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**TOTAL**
## Measurement System & Performance Improvement Design

### MEASUREMENT SYSTEM DESIGN

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### PERFORMANCE IMPROVEMENT DESIGN

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**TOTAL**
# Assessment

## Marketing/Sales Alignment & Cultural Alignment

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**TOTAL**
The Path Forward

A Business Model and Framework for Achieving Sustainable Strategic Results
The Strategic Dimension
The Role of Strategic Clarity

VISIONS AND TARGETS

2015

Strategy Targets
Clear Aims Cascaded to Organization
Value Proposition to Customers
Aligning Energy
Nurturing the Organization
Strategic Alignment and Deployment
Cascading of Aims and Improvement

MISSION / VISION
SYSTEM
System Improvement Plan
BRAND
Brand Improvement Plan
DEPARTMENT
Quality in Daily Work
INDIVIDUAL
Individual Improvement Plan

Current Performance
Analysis of Gap-Finance Model

AIMS 1-3-5 yr
AIMS 1-3-5 yr
AIMS 1-3-5 yr
AIMS 1-3-5 yr
AIMS 1-3-5 yr

Current Performance
Analysis of Gap-Finance Model

Portfolio of Projects
120 Day Cycle
Portfolio of Projects
120 Day Cycle
Portfolio of Projects
120 Day Cycle
Portfolio of Projects
120 Day Cycle

Strategic Results

SPREAD

Institute for Healthcare Improvement
The Role of the Production System

Design and deliver to specifications
Sub-system that includes all functions required to design, produce, distribute, and service a manufactured product.
Platform Planning

Collection of assets that are shared by a set of products

- Components
- Processes
- Knowledge
- People and relationships

Robertson/Ulrich
Three Information Management Tools

The Product Plan

The Differentiation Plan

The Commonality Plan

Robertson/Ulrich
Anatomy of the Production System

Five views of the Production System

1. Individual contributor
2. Unit / team
3. Product across the continuum
4. Functional / operational area
5. Large scale commonality
The Production System

Knowledge of the Individual

Connected Personal Experience

Individual Health & Life Goals

Institute for Healthcare Improvement
Product Across the Continuum

Stroke Management

Knowledge of the Individual

Collective Patient Experience

Individual Health & Life Goals

PCP  EMS  ED  4Med  OT/PT  SNF  Rehab  Neuro  PCP
The Production System

Unit / Team

Knowledge of the Individual

Collective Personal Experience

Individual Health & Life Goals

PCP  EMS  ED  4Med  OT/PT  SNF  Rehab  Neuro  PCP

$  H  Q  24
The Production System

Individual Contributor

Knowledge of the Individual

Collective Personal Experience

Individual Health & Life Goals

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Q

25

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The Production System

Functional & Operational Areas

Knowledge of the Individual

Collective Personal Experience

Individual Health & Life Goals

Nursing

H

$Q$

26
Large Scale Commonality

Knowledge of the Individual

Collective Personal Experience

Community Health  Wellness/Prevention  Acute Care  After Care

Individual Health & Life Goals

The Production System

Institute for Healthcare Improvement
Measurement System for the Production System

1. Knowledge of the Individual
2. Community Health
3. Wellness/Prevention
4. Collective Personal Experience
5. After Care

Product Continuum
Individual Health & Life Goals

Nursing

Institute for Healthcare Improvement
The Role of the Measurement System

Inform and Provide Knowledge
System Scorecard

- Focus on system-level measures
- Limited to a relatively small set
- Grouped by system strategies
- Balanced among the strategies
- Allow for comparisons to similar organizations
- Relatively straightforward, not overly complex
- Within control of the organization / Actionable
- Implies operational measures that impact system measures

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Types of Measures

Process Measures
- Patient, Family and Customer-Centered Organization
- Engaged Staff and Partners
- Improved Health of the Population
- Growth & Prosperity

Outcome Measures
- Patient, Family and Customer-Centered Organization
- Engaged Staff and Partners
- Improved Health of the Population
- Growth & Prosperity
The Five Views of Measurement

1. Large Scale Commonality
2. Product Across the Continuum
3. Team, Team, Team, Team

Collective Personal Experience
- Community Health
- Wellness/Prevention
- Acute Care
- After Care

Operational & System Support
## Aligning Production & Measurement

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<td>Service Line Leader</td>
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System of Improvement
Managing Organizational Energy

- Fully Utilized
  - Lots of activity
  - Fully utilized capacity
- Under Utilized
  - Low activity
  - Empty capacity
- Non Aligned
  - Few results
  - Many results
- Aligned
  - Few results
  - Limited/mixed results

The Sweet Spot of organizational energy
## Energy Grid

### Energy Grid: Performance Plan Cycle March - June 2011

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<th>Department/Clinic</th>
<th>Growth &amp; Prosperity QCs</th>
<th>Improved Health of the Population QCs</th>
<th>&amp; Partners QCs</th>
<th>PT, Family &amp; Customer-Centered Org QCs</th>
<th>Growth &amp; Prosperity Innovations</th>
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MANAGING ORGANIZATIONAL ENERGY

Current Processes
Reliable/Predictable/Safe

Priority Gate

Innovation
"Pool of Ideas"

Spread Gate

Improvement
Priorities

Strategy
Results

CURRENT Performance

Strategy
Aims

NEW Performance
The Discipline of Execution

The Five Key Cycle Phases

Phase I – The Diagnostic Journey
Phase II – Prioritization and Focus
Phase III – Organizing the Work
Phase IV – Work Period
Phase V – Recalibration
Market / Sales Alignment
We know that a cancer diagnosis can be overwhelming and with it can come a host of concerns and decisions that have to be made. For most people there is an immediate need for information and a desire to be “doing something”. We want to help you make sure the information you’re getting is accurate and helpful so that you can move through each step of the decision-making process in control and on your teams.

_This isn’t about rushing . . . It’s about responding._

There is nothing more frightening than being told you have cancer. Unless it’s being told you have cancer and then being told nothing at all for days. . . Even weeks. At The Cancer Team, we’re committed to treating you with dignity and respect by first making sure that you aren’t left alone with your fears. From the beginning, The Cancer Team member will work together to respond and include you in the process of developing a treatment plan.
Cultural Alignment
High Performance Culture Model

Key Drivers
- Leadership Development
- Professional/Personal Development
- Quality Improvement
- Organizational (Strategic) Learning
- Strategy Execution
- Wage, Benefit and HR Related Policies
- Reward/Recognition
- Recruitment & Acclimation to the Culture *Preceptor/Mentor
- Evaluation Methods *Individual Scorecards *Performance Feedback
- Future Sustainability

People Platforms
- Promotes a Culture of Safety
- Innovative Thinking
- Team Player
- Individual Accountability
- Effective Leadership
- Effective Communications
- Individual Professional Growth
- Highly Empowered
- Act Like You're an Owner - Stewardship
- Positive Interdisciplinary Relationships
- Highly Productive Performance
- Creates Patient Satisfaction
- High Quality Work Performance
- High Personal Satisfaction
- Champions Mission Vision Values

Individual Attributes of High Performance Culture
- Pride in Organization
- Highly Engaged
- Contributes to Strategy
- Act Like You're an Owner - Stewardship
- Positive Interdisciplinary Relationships
- Highly Productive Performance
- Creates Patient Satisfaction
- High Quality Work Performance
- High Personal Satisfaction
- Champions Mission Vision Values

Scorecard
High Performance Culture

Retention
- Employee Health & Safety
- Engagement
- Performance
1. Identify areas for development
2. Identify team to assess and build plan for each dimension
3. Develop longer term aims for each dimension
4. Develop short term (120 days) action plan to close the gap
5. Provide reports and feedback to the organization
6. Develop a Steering Team
Thank you!