NATIONAL RURAL HEALTH RESOURCE CENTER

Dashboard TA Webinar

Matthew Mendez, BS, MHA, Senior Consultant

June 16, 2021

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling $10,000,000 with 100% funded by HRSA/HHS and $0 amount and 0% funded by non-government sources. The contents are those of the authors(s) and do not necessarily represent the official views of, nor an endorsement by HRSA/HHS, or the U.S. Government.

Delta Region Community Health Systems Development (DRCHSD) Program

Delta Regional Authority

U.S. Department of Health & Human Services

HRSA

Federal Office of Rural Health Policy

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Pre-Polling Questions

I am ____ in my understanding of the importance of using a dashboard to drive performance.

I am ____ in my understanding of how to improve performance through better project management.

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Introduction

Matthew Mendez, BS, MHA, Senior Consultant
Stroudwater Associates

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Performance Improvement Tools and Practices Overview

Delta Region Community Health Systems Development (DRCHSD)

June 16, 2021

Matt Mendez, MHA

Learning Objectives

- Gain a greater understanding of the importance of **using a dashboard and other tools to drive performance**
- Learn how to **improve performance through better project management**
- To encourage **adoption of these tools and best practices** to enhance your organizations performance

Outline

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- Common pitfalls and how to navigate them
- 4 Ps of driving performance
- Overview of performance improvement tool suite
  - Practice session
- Best practices for navigating additional hazards
- Wrap up / Q & A

Common Pitfalls

Common pitfalls of driving performance improvement

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Pitfalls

- Lack of clear vision and supporting strategic objectives
- Lack of a project plan to accomplish objectives
- Not breaking down project into manageable pieces or action steps
- Stacking and overloading → shock & awe by attempting too much at once
- Not tracking performance
- Not identifying owners

Navigation Tools / Practices

4 Ps: **P**rioritize, **P**lan, **P**erformance Measurement, **P**roject Management

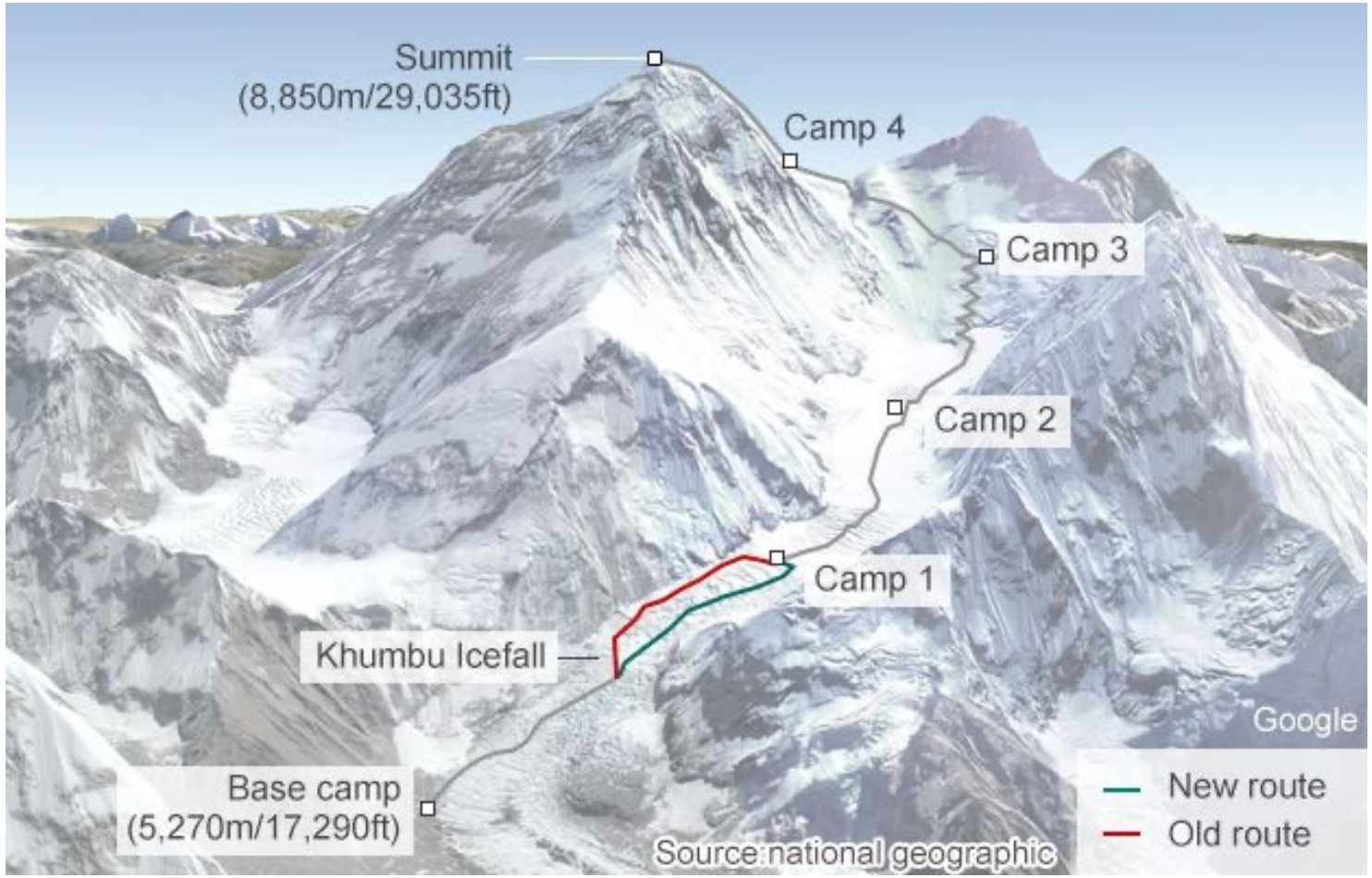
4 Ps of Driving Performance: Prioritize, Plan, Performance Monitoring & Project Management

Sir Edmund Hillary's Big Hairy Audacious Goal (BHAG)

Source: https://mpora.com/mountaineering-expeditions/edmund-hillary-facts/

- First ascent of Mt. Everest → world's tallest peak – 29,035 feet
- Was a beekeeper which financed his love of climbing
- Summitted Everest on May 29,1953 at the age of 33
- Tenzing Norgay was his climbing partner
- Legacy of exploration
  - Peter Hillary and Jamling Tenzing Norgay, the sons of Edmund Hillary and Tenzing Norgay, summitted Everest together in 2002

Sir Edmund Hillary's BHAG – Make a plan, break it down and climb!



- Started with a dream/ BHAG
- Crafted a plan →
  - Identified key components: training, equipment, provisions, travel logistics, Sherpa support, etc.
  - Broke plan down into manageable milestones and tasks (base camp 1 to Summit)
- Organized an expedition → it takes a team!
- Worked the plan & monitored progress
- Celebrate success & reflect

4 Ps of Driving Performance Improvement

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1 Prioritization

Top 10 Team Recommendations (Priority Vote Order)	
1.)	
2.)	
3.)	
4.)	
5.)	
6.)	
7.)	
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10.)	

2 Planning

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
3.)				
4.)				
5.)				

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3 Performance Monitoring

Goals	Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
EXAMPLE: Climb Mt. Everest within 6 months (8,848 meters) (Delete example prior to submission)	Meters Climbed / Day	1200 / Month (40 / Day)	1475 / Month (50 / Day)	Sir Edmund	1100	1275	1350	1480					
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5.)													

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Performance Key: Below Target | Moving to Target | Above Target

4 Project Management

Goals	Projected Completion Date	Estimated Time	Start Date	End Date	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11
EXAMPLE: Climb Mt. Everest within 6 months (8,848 meters) (Delete example prior to submission)	12/31/25	6 months	Jan	June	Sir Edmund											
1.)																
2.)																
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Prioritization – Identify the most important initiatives

Top 10 Team Recommendations (Priority Vote Order)	
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2 Planning – Define the key action steps, owners and timing

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1. Choose initiative from list of priority recommendations identified by your hospital

2. Who will be the primary person responsible for overseeing completion of the action plan for this initiative?

3. Define the issue(s) or problem(s) you are trying to solve. What is Current State vs. desired Future State?

4. Define the Goal in terms of SMART (Specific, Measurable, Attainable, Realistic, Time-phased)

5. Indicate anticipated goal completion date

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
3.)				
4.)				
5.)				

6. Identify specific action steps, that when built upon one another, will naturally lead to goal accomplishment

7. Capture the responsible person, target dates, resources, and any other key information for each action step

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3 Performance Monitoring – Establish targets and track results

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1. Measure: Define the performance metric that will be used to measure progress for each goal

2. Baseline: Define the historical performance "starting point"

3. Target: Define monthly performance target

4. Result: Populate monthly result and apply color (red – below, yellow – striving, green – at or above) based on below performance key

Goals		Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
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Performance Key		
Below Target	Moving to Target	Above Target

4 Project Management – Break the plan into manageable parts

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1. Estimated Time: Define how long the goal is anticipated to take from start to finish

2. Start / End Dates: Define the anticipated start and end dates for each goal

3. Time Blocks: Populate the project plan according to the estimated time and start / end dates

Goals	Projected Completion Date	Estimated Time	Start Date	End Date	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11
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Practice Session

- **Planning**
- Performance Monitoring
- Project Management

4 Ps of Driving Performance Improvement - Planning

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1 Prioritization

Top 10 Team Recommendations (Priority Vote Order)	
1.)	
2.)	
3.)	
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6.)	
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2 Planning

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
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3 Performance Monitoring

Goals	Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
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4 Project Management

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2 Planning – Define the key action steps, owners and timing (again)

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1. Choose initiative from list of priority recommendations identified by your hospital

2. Who will be the primary person responsible for overseeing completion of the action plan for this initiative?

3. Define the issue(s) or problem(s) you are trying to solve. What is Current State vs. desired Future State?

5. Indicate anticipated goal completion date

4. Define the Goal in terms of SMART (Specific, Measurable, Attainable, Realistic, Time-phased)

Action Plan # 1		**Owner**	
Issue(s)			
Goal		**Target Date**	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
3.)				
4.)				
5.)				

6. Identify specific action steps, that when built upon one another, will naturally lead to goal accomplishment

7. Capture the responsible person, target dates, resources, and any other key information for each action step

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2 Planning – Define the action plan owner

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

2. Who will be the primary person responsible for overseeing completion of the action plan for this initiative?

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
3.)				
4.)				
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2 Planning – Define the issue(s) you are trying to resolve

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

3. Define the issue(s) or problem(s) you are trying to solve. What is Current State vs. desired Future State?

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
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2 Planning – Define a SMART Goal

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Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

4. Define the Goal in terms of SMART (Specific, Measurable, Attainable, Realistic, Time-phased)

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
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4.)				
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2 Planning – Define the goal target date

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Action Plan # 1		Owner	
Issue(s)			
Goal		**Target Date**	

5. Indicate anticipated goal completion date

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
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2 Planning – Define the action steps

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Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
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6. Identify specific action steps, that when built upon one another, will naturally lead to goal accomplishment

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2 Planning – Define the action step owner and target date

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
2.)				
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5.)				

7. Capture the responsible person, target dates, resources, and any other key information for each action step

Light yellow shaded cells indicates required input

Practice Session

- Planning
- Performance Monitoring
- Project Management

4 Ps of Driving Performance Improvement – Performance Monitoring

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1 Prioritization

Top 10 Team Recommendations (Priority Vote Order)	
1.)	
2.)	
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2 Planning

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
1.)				
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3 Performance Monitoring

Goals	Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
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3 Performance Monitoring

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1. Measure: Define the performance metric that will be used to measure progress for each goal

2. Baseline: Define the historical performance "starting point"

3. Target: Define monthly performance target

4. Result: Populate monthly result and apply color (red – below, yellow – striving, green – at or above) based on below performance key

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Performance Key

Below Target | Moving to Target | Above Target

3 Performance Monitoring – Define the performance metric

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1. Measure: Define the performance metric that will be used to measure progress for each goal

Goals		Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
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Performance Key

Below Target | Moving to Target | Above Target

3 Performance Monitoring – Define the baseline starting point

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2. Baseline: Define the historical performance "starting point"

Goals		Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
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Performance Key		
Below Target	Moving to Target	Above Target

3 Performance Monitoring – Define the monthly target

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3. Target: Define monthly performance target

Goals		Measure	Baseline	Target (Per Month)	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
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Performance Key		
Below Target	Moving to Target	Above Target

3 Performance Monitoring – Define the monthly target (continued)

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4. Result: Populate monthly result and apply color (red – below, yellow – striving, green – at or above) based on below performance key

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Performance Key

Below Target | Moving to Target | Above Target

Practice Session

- Planning
- Performance Monitoring
- Project Management

4 Ps of Driving Performance Improvement – Project Management

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1 Prioritization

Top 10 Team Recommendations (Priority Vote Order)	
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2 Planning

Action Plan # 1		Owner	
Issue(s)			
Goal		Target Date	

#	What is Action Step?	Who is the Owner?	By When?	Follow-Up and Next Steps
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4 Project Management – Define the estimated time (start to finish)

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1. Estimated Time: Define how long the goal is anticipated to take from start to finish

	Goals	Projected Completion Date	Estimated Time	Start Date	End Date	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11
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4 Project Management – Define start and end dates

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2. Start / End Dates: Define the anticipated start and end dates for each goal

Goals	Projected Completion Date	Estimated Time	Start Date	End Date	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11
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4 Project Management – Populate time blocks (start to finish)

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3. Time Blocks: Populate the project plan according to the estimated time and start / end dates

Goals	Projected Completion Date	Estimated Time	Start Date	End Date	Owner	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11
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Best Practices for Navigating Additional Hazards

Additional pitfalls of driving performance improvement

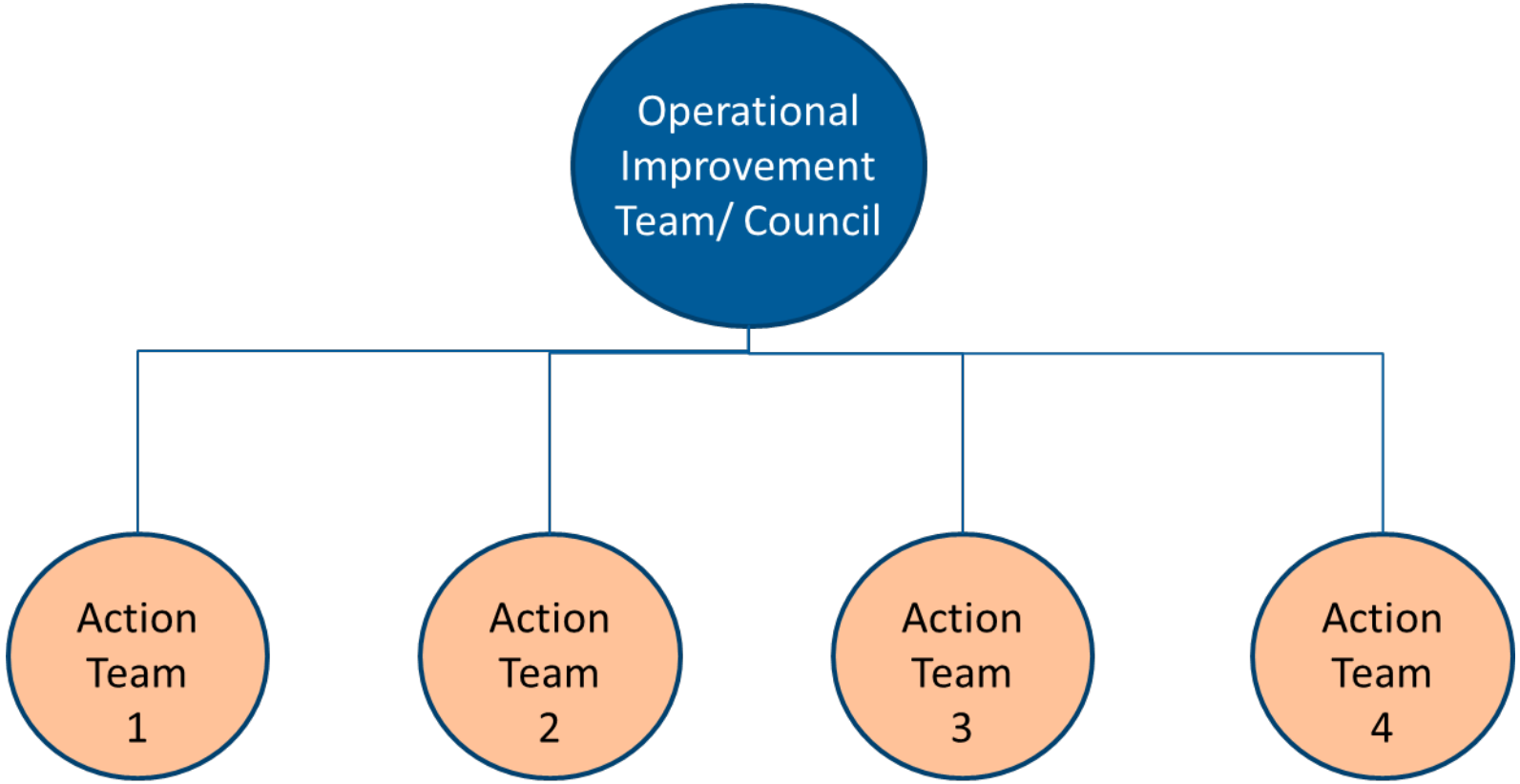
Pitfalls

- Delegating implementation
- Not designing a collaborative team structure to support change
- Not engaging all stakeholders
- Not managing the project plan
- Failure to frequently communicate
- Lack of learning and innovation cycle

Navigation Tools / Practices

- Establishment of a change council/ structure
- Chartering of action teams
- Collaborative problem-solving
- Development of a communication plan
- Frequent reflection, celebration and adaptation

Establish a change structure



Define a charter for each action team

ACTION TEAM NAME	
CO – LEADERS	
CHARTER EFFECTIVE DATE and DURATION	
PURPOSE *(Overall charge, purpose, or focus)*	
DELIVERABLES *(Products the Action Team is asked to produce.)*	
EXPECTATIONS OF MEMBERS *(Meeting frequency and attendance, promote Action Team activities, review meeting materials, time commitments)*	
COMPOSITION	

Utilize collaborative problem-solving tools / techniques

- All team meetings have an agenda
- Team meetings have a neutral facilitator to foster engagement and collaboration
- Meeting agendas start with Desired Outcomes and end with Action Items
- Meetings are debriefed for continuous learning
  - What went well and should be continued
  - What should be done differently

Frequently communicate through multiple channels

- Transparent communication across the organization to foster ownership and engagement
- Cascade the performance improvement plan in management meetings, department meetings, town hall / employee forums
- Share progress with all stakeholders to drive alignment and accountability

Reflect, celebrate success and continuously adapt

- Periodically reflect on the performance journey and engage the team to debrief to capture observations and insights for improvement
- Pause to celebrate the wins and frequently recognize the contributions of individuals and teams
- Solicit ideas from all stakeholders to foster innovation and shared learning

QUESTIONS & ANSWERS

Thanks for your attention!

Matt Mendez, MHA
mmendez@stroudwater.com
(910) 508-7672

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Post-Polling Questions

I am ___ in my understanding of the importance of using a dashboard to drive performance.

I am ___ in my understanding of how to improve performance through better project management.

I am ___ that I will apply the action planning tool provided through the DRCHSD Program to support the implementation of best practice recommendations and monitor success.

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