Transition Strategies from the 2017 Rural Hospital Value-Based Strategic Summit: Strategy Map & BSC Templates

SRHT Team
Summit Panelists

August 30, 2017
The National Rural Health Resource Center (The Center) is a nonprofit organization dedicated to sustaining and improving health care in rural communities. As the nation’s leading technical assistance and knowledge center in rural health, The Center focuses on five core areas:

- Transition to Value and Population Health
- Collaboration and Partnership
- Performance Improvement
- Health Information Technology
- Workforce
Presentation Objectives

• Present findings from 2017 Rural Hospital Value-Based Strategic Summit
• Develop a strategic plan to transition the hospital and network to value-based care population health
• Operationalize key transition strategies and manage the actions through an easy to adopt systems approach
• Apply best practices to improve hospital efficiency and decision-making
• Build awareness of available tools and resources that support rural hospitals for population health
Supported by: Federal Office of Rural Health Policy (FORHP)

Purpose: To provide leaders with templates that improve organizational planning, strengthen actionable steps and operationalize key strategies that enable hospitals and networks to effectively transition to value

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under grant number UB1RH24206, Information Services to Rural Hospital Flexibility Program Grantees, $957,510 (0% financed with nongovernmental sources). This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.
2017 Summit Panelists

May 24, 2017, Bloomington, Minnesota
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It’s Changing!

Better Care + Smarter Spending = Healthier People

**Triple Aim**
- ✔ Better Care
- ✔ Better Health
- ✔ Lower Cost

Better Care + Smarter Spending = Healthier People
Value of the Rural Hospital and Network

Demonstrate value by increasing quality of care and patient satisfaction while reducing cost and over utilization

Value = Improved quality and patient satisfaction Relative to reduced utilization and costs
Demonstrate Value

• Demonstrate value with metrics
  ◦ Population health
  ◦ Patient experience
  ◦ Per capita cost

• Rural relevant measures
  ◦ HCAHPS scores
  ◦ Mortality rates
  ◦ Total cost per member per month
  ◦ ED utilization rates and costs
Strategies Applied to the Performance Excellence Blueprint

**Strategic Planning**
- Create a shared vision of value and understand the role rural hospitals and providers have in the transition to value-based models

**Work Force**
- Engage and educate managers and front-line staff on value-based models and emphasize team-based care to support patient-centered services
- Educate, partner and align with physicians and other local and regional primary care providers
- Assess culture to obtain feedback on needs, development, improvement and employee recognition

**Leadership**
- Invest in provider and hospital leadership development programs that include board of directors, managers and clinical staff
- Identify opportunities to collaborate with other providers and organizations to build interdependence such as affiliations to support value-based models

**Results: Impact and Outcomes**
- Collect and share rural relevant data with providers, hospital leaders and staff
- Document hospital outcomes and demonstrate value of services to providers, staff and community

**Operations and Processes**
- Improve financial, clinical and operational efficiency
- Redesign operational and clinical processes for value-based models

**Customers: Patients, Partners and Community**
- Develop collaborative relationships and connect community resources to address patient needs
- Tell your story to community and staff to promote quality of care and market services
- Advocate for policy and regulatory changes

**Measure, Analysis, Feedback and Knowledge Management**
- Collect, manage and act on data to include patient outcomes, and hospital, claims and county health status data
- Use reliable and valid data for quality reporting and ensure that the board of directors, providers and staff understand the results
Templates are designed to adopt MS Word documents to allow leaders to:

- Effectively develop and execute a strategic plan
- Incorporate and expand their organizations' strategic plans to transition to a value-based system and position for population health
2017 Rural Hospital Value-Based Strategic Summit: BSC & Strategy Map Templates

Downloads & Links
- Value-Based Summit Template Guide (PDF Document - 56 pages)
- Strategy Map Template (Word - 2 pages)
- Balanced Scorecard Template (Word - 5 pages)

August 2017
Author: National Rural Health Resource Center (The Center)

The 2017 Rural Hospital Value-Based Strategic Summit was held to provide leaders with templates that improve organizational planning, strengthen actionable steps and operationalize key strategies that enable hospitals and networks to effectively transition to value.

The Transition to Value Strategy Map and Balanced Scorecard templates are provided as separate downloadable Microsoft Word documents. The templates are ready to use and are
Strategy Map Template Function

• Key to successfully executing a strategic plan because it communicates objectives to achieve organization-wide understanding

• A communication tool that:
  ◦ Graphically depicts the organization’s strategy
  ◦ Illustrates how the strategies relate to one another
  ◦ Frames key concepts of the organization’s strategic plan into a guide that directs the BSC and its actions to operationalize the strategies
Tailor the Strategy Map Template

• Download the **Strategy Map Template** to develop and tailor a Strategy Map for your organization

• Template is:
  ◦ Prefilled with key transition strategies
  ◦ Focused on organization-wide value
  ◦ Designed to assist leaders in demonstrating value for their hospitals and networks
**Learning & Growth**
As an organization, what type of culture, training and technology are we going to develop to support our processes?

- Invest in provider and hospital leadership development to include board of directors, managers and clinical staff
- Assess culture through rounding to obtain feedback on needs, development, improvement and employee recognition
- Use a self-funded employee health plan and associated claims data to learn how to manage population health interventions
- Engage and educate managers and front-line staff on value-based models and emphasize team-based care to support patient-centered services

**Internal Processes**
What do we need to do to meet the needs of the patients and community?

- Improve financial, clinical and operational efficiency
- Redesign operational and clinical processes for value-based models
- Collect, manage, and act on data to include patient outcomes and hospital, claims and county health status data
- Create a shared vision of value and understand the role that rural hospitals and providers have in the transition to value-based models

**Patients, Partners, Community**
What do our patients, community, and partners want, need or expect?

- Educate, partner and align with physicians and other health care providers
- Tell your story to community and staff to promote quality of care and market services
- Develop collaborative relationships and connect community resources to address patient needs
- Seek opportunities to collaborate with providers and organizations to build affiliations to support value-based models

**Financial**
How do we intend to meet the goals and objectives in the Hospital’s Mission?

- Develop a strategic plan to transition to value-based model (VBM)
- Participate in ACO or Shared Savings (SS) Programs to support payment system transformation
- Participate in a certified PCMH and seek reimbursement for per member per month fees to position for population health
- Document hospital outcomes and demonstrate value of services to providers, staff and community
Balanced Scorecard Template Function

- An organization-wide dashboard to collect, track and monitor strategic objectives
- Links the hospital’s mission and vision through four strategic themes
  - Learning and growth
  - Internal processes
  - Patients, partners and community
  - Financial
Tailor the Balanced Scorecard Template

• Download the BSC Template to develop and create a dashboard for your organization
• Use the Guide’s BSC examples to identify
  ◦ Strategic objectives that support the organization’s Strategy Map
  ◦ Initiative (actions) that are needed to achieve objective
  ◦ Common metrics and target levels
• Use the Guide to identify performance measures, target levels and find data sources to customize the BSC for the organization
# BSC Template Example

## Learning and Growth Example

<table>
<thead>
<tr>
<th>What</th>
<th>Action Plan</th>
<th>How</th>
<th>Target:</th>
<th>Responsible:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic Objective:</strong> What is the strategy to achieve?</td>
<td><strong>Initiatives:</strong> What actions are needed to achieve objective?</td>
<td><strong>Measure:</strong> What indicator is required to track and monitor the objective?</td>
<td>For each indicator, what performance level is required to achieve the objective?</td>
<td>Team member to track and report measure.</td>
</tr>
<tr>
<td>Develop internal capacity for population health management</td>
<td>Engage staff to build a greater understanding of the future of health care. Build staff’s ability to use data analysis to ‘hotspot’ high-risk populations</td>
<td>Employee satisfaction levels</td>
<td>On a 5.0 Likert scale, obtain 4.0 or greater.</td>
<td>Manager A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee Training participation rate</td>
<td>Target 90% of employees that participate in trainings on quarterly basis</td>
<td>Manager B</td>
</tr>
<tr>
<td>Frequency: How often to report measure?</td>
<td>Qtr. 1</td>
<td>Qtr. 2</td>
<td>Qtr. 3</td>
<td>Qtr. 4</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
</tr>
<tr>
<td>Example: Assess employee satisfaction level annually</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assess employee participation rates quarterly</td>
<td>75%</td>
<td>80%</td>
<td>85%</td>
<td>90%</td>
</tr>
</tbody>
</table>
## Performance Measures, Target Levels and Data Resources

<table>
<thead>
<tr>
<th>BSC Theme</th>
<th>Areas for Performance Improvement Opportunities</th>
<th>Common Measures and Target Levels</th>
<th>Data Sources</th>
<th>Steps to Support Measurement</th>
</tr>
</thead>
</table>
| Learning and Growth| Physician and staff engagement Staff education and capacity building Leadership and board development Management training Recruitment and retention | Staff turnover rate Employee satisfaction levels Physician satisfaction levels Employee and physician satisfaction survey return rate Physician retention rate | AHRQ Hospital Survey on Patient Safety Culture HR Employee Records | Develop a board of directors’ educational program:  
  - Set education goal  
  - Assess knowledge gaps  
  - Assign knowledge page area to board |
The Rural Hospital Toolkit for Transitioning to Value-based Systems (Toolkit)

With the support of the Federal Office of Rural Health Policy, the Toolkit was developed to:

• Disseminate consultant recommended best practices for improving financial, operational and quality performance

• Share key transition strategies that position rural hospitals and networks for the future

• Distribute tools that support the implementation of best practices and adoption of transition strategies

• Share evidenced-based methods provided through nationally recognized organizations
The Toolkit

Rural providers and leaders should use the Toolkit to identify performance improvement opportunities to develop strategies for successfully transitioning to population health.

It is suggested that users access the Self-assessment for Transition Planning first to receive feedback about current strengths and areas for development.
The Toolkit is comprehensive and represents the SRHT hospital consultation reports and action plans:

- **Strategic Planning**
- **Leadership: Board, Employee and Community Engagement**
- **Physician and Provider Engagement and Alignment**
- **Population Health Management**
- **Financial and Operational Strategies**
- **Revenue Cycle Management and Business Office (BO) Processes**
- **Quality Improvement**
- **Community Care Coordination and Chronic Care Management**
Apply the **Toolkit Strategic Planning** tools to:

- Perform a Transition Self-assessment to prepare for planning process
- Complete a CHNA to align services and strategic initiatives with community needs, and develop a community care plan
- Apply the PE Blueprint to develop a systems approach to strategic planning
- Use the Strategy Map Template to implement the plan and communicate the strategic initiatives
- Use the BSC Template to track performance and achievements and demonstrate value
Thank you for completing the Self-Assessment for Transition Planning. If you have questions or comments about the assessment, please contact srht@ruralcenter.org.

General Information About the Results

These results display information and recommendations tailored to your specific responses. This information will assist you in strategic planning and navigating the Rural Hospital Toolkit for Transitioning to Value-based Systems. The results are designed to provide best practice recommendations and transition strategies that will help you to prepare your hospital/network for population health.

Your total score is 100 points. The total score is intended to act as a starting point with which you may monitor your organization’s performance improvement as a four-point scale as follows:

4: Strongly Agree
3: Somewhat Agree
2: Somewhat Disagree
1: Strongly Disagree

The tables below list the 29 individual self-assessment questions.

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
<th>Related Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is aware of health industry trends and changes and how they may impact our facility</td>
<td>3</td>
<td>Strategies for Rural Hospital Success in the New Health Care Market</td>
</tr>
<tr>
<td>Understands need for systems (multi-faceted) approach in all aspects of our organization</td>
<td>4</td>
<td>A Blueprint for Rural Hospital Performance Excellence: One Hospital’s Baldrige Experience</td>
</tr>
<tr>
<td>Provides ongoing education opportunities for board, internal leadership and managers</td>
<td>3</td>
<td>Refer to HELP webinar playbacks for trainings that best fit your organization’s educational needs</td>
</tr>
<tr>
<td>Aligns organization and medical leadership around values, goals and strategies</td>
<td>3</td>
<td>Physician Engagement – An Imperative for Success</td>
</tr>
</tbody>
</table>

Take the Self-Assessment for Transitioning Planning
Hospital Best Practices and Recommended Strategies

- Quality-Focused Culture
- Provider Communication and Patient Engagement
- Quality and Patient Satisfaction Scores
- Care Management
- Discharge Planning
- Care Transitions and Readmissions
- Quality Improvement Tools
- Quality Indicators and Reporting Tools
- Trainings and Examples

Quality-Focused Culture

Implement the following best practices to develop an organization-wide quality culture:

- CMS Conditions of Participation requires CAHs and PPS facilities to implement, evaluate their own Quality assurance / performance improvement (QAPI) systems, monitor and improve patient care and incorporate quality indicator data related to preventable readmissions and hospital-acquired conditions. Best-practice rural hospitals and health systems staff have a clear understanding of the hospital’s QAPI Plan:
  - Share the hospital-wide QAPI Plan with staff
  - Provide ongoing staff education and relate staff responsibility to improve quality and drive PI.
- Establish quality of care and patient-safety as a key strategy for the organization

Quality Improvement
QI Example: Teach Back Method

Select to download PDF Version (467.82 KB).

Overview

Regardless of a patient’s health literacy level, it is important that staff ensure that patients understand the information they have been given. The teach-back method is a way of checking understanding by asking patients to state in their own words what they need to know or do about their health. It is a way to confirm that you have explained things in a manner your patients understand. The related show-me method allows staff to confirm that patients are able to follow specific instructions (e.g., how to use an inhaler).

- The teach-back and show-me methods are valuable tools for everyone to use with each patient and for all clinic staff to use. These methods can help you:
  - Improve patient understanding and adherence.
  - Decrease call backs and cancelled appointments.
  - Improve patient satisfaction and outcomes.

Fact

Studies have shown that 40-80% of the medical information patients are told during office visits is forgotten immediately, and nearly half of the information retained is incorrect.

Action

Learn the teach-back method.

- The Always Use Teach-Back! Toolkit describes principles of plain language, teach-back, coaching, and system changes necessary to promote consistent use of teach-back. Its 45-minute Interactive Teach-Back Learning Module includes key content and videos of clinicians using teach-back. The module can be used by clinicians, staff members, in a group setting, or as a self-directed tutorial.
- 5-Minute Teach-Back Video. This 5-minute video gives two examples for clinicians of how to use teach-back with medicine changes.
Financial and Operational Strategies

Hospital Best Practices and Recommended Strategies

The below best practice recommendations, transition strategies and performance tools assist leaders with maximizing financial performance and improving operational efficiencies to financially stabilize the hospital and position for the future.

- **Demonstration of Value**
- **Transition Strategies**
- **Performance Improvement Tools**
- **Key Performance Indicators**
- **Emergency Department (ED) Operations and Performance Indicators**
- **340B Drug Pricing Program**
- **Department Accountability**
- **Trainings and Examples**

**Demonstration Of Value**

- Apply recommended strategies and follow guidance in the 2017 Rural Hospital Strategic Summit Guide and Templates to demonstrate value of the organization for reimbursement and financial stability.

**Financial & Operational Strategies**
SRHT Application (2017 – 2018)

• Application period opens September 25, 2017 and closes midnight on October 16, 2017

• Application is available on SRHT Project website and contains:
  ◦ Preview of application and self-assessment questions, to allow for early preparation
  ◦ Helpful hints to submit a strong application
  ◦ Direct links to the online application and self-assessment, which will go live on September 25
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