Succeeding with a Moving Health System Target

Capital Area Human Services District

Kristin Woodlock RN, MPA
CEO, Woodlock & Associates
Woodlockk@gmail.com
917.244.4221
The Happiest And Unhappiest Cities In America

Good news for residents of Louisiana: According to a new working paper published by the U.S. National Bureau of Economic Research, six of the state's cities rank as the happiest areas in America. Researchers also found that New Yorkers are the unhappiest based on the study’s scale, which extracted data from a Centers for Disease Control and Prevention survey based on life satisfaction and adjusted that data for age, income, race, sex and other factors. To see where your city ranks, check out the breakdown below.

Top ten and bottom ten metro areas ranked by happiness, adjusted for income and demographics

- Happiest cities
- Unhappiest cities

TEN HAPPIEST CITIES
1. Lafayette, La. 0.145
2. Houma, La. 0.133
3. Shreveport-Bossier City, La. 0.125
4. Baton Rouge, La. 0.101
5. Alexandria, La. 0.023
We Live in Interesting Times...

We need an organizing principle + model to move forward

This is NOT your Grandma’s Healthcare

Millennial Nonprofit/Behavioral Health Provider
1.0 Refresher

Evolution of Behavioral Health Providers
Evolution of Nonprofits/Behavioral Health Providers

1. Charitable Organizations
   - God’s Work

2. Agents of Government
   - Government’s Work

3. Value-Based Payment
   - Retail

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Government Agent Model

Cash Flow

Working Capital

Providers Boxed in by Regulation

Price has no connection to cost

Policy changes before incentives and structures

Volume over Value

Disconnected

Policy

Regulation

Incentives

Government shifts cost and risk

Hindsight

20/2

15 Years to Bring Evidence Based Practice to Scale

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Retail Markets

1. IPA, PPS, ACO...
   Network Provider

2. Gov’t, Health Plan...
   Increasingly Diverse Payors
   "Value over Volume"

3. Pay-for: reporting, performance, upside risk

Contract to Fee-for-Service to Retail

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Where is the app to give you directions from Agent of Government to Retail?
NOTE: Millennial Nonprofit – is a term of art that is applicable to ANY and ALL BEHAVIORAL HEALTH PROVIDERS. Even...for-profit or government!

- Operating structure in a value-centric world (retail)
- New competencies - New business model
- Competition engine of progress and reform
- Distinctiveness is at the core
…are distinctive and have internalized the concept of value.

…are diagnosticians and solution focused.

…have initiative, skills, products and outcomes needed by the health care system.
• Your *True North*

• Organizing Principle for Your Agency

• Creates Your Identity

• Your mission today vs. yesterday
The mission of the Institute for Family Health is to improve access to high quality, patient-centered primary health care targeted to the needs of medically underserved communities.

Our mission is to enable every person in our society to thrive by building a collaborative behavioral and physical health ecosystem.

To promote the behavioral health of children, youth, and families and support a positive transition to adulthood.
Pine Street Behavioral Health leads the state of Oklahoma in providing behavioral health care and educational services for individuals with chemical dependency and severe emotional disturbances. Our services are provided in a least restrictive setting, through a continuum of care, with the highest respect for individuals and families served. In addition to direct care services, Pine Street provides consultation and training for mental health, substance use and educational professionals and promotes research in these specialized areas.
The Good and the Bad

<table>
<thead>
<tr>
<th>A Good Statement...</th>
<th>A Bad Statement...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uses language your constituents use.</td>
<td>Uses jargon, doesn’t understand your audience.</td>
</tr>
<tr>
<td>Is emotionally stirring.</td>
<td>Is logical and cold.</td>
</tr>
<tr>
<td>Communicates the “why.”</td>
<td>Communicates only the “what” or “how.”</td>
</tr>
<tr>
<td>Is concise.</td>
<td>Is really long.</td>
</tr>
<tr>
<td>Is a single, powerful sentence.</td>
<td>Is a rambling paragraph.</td>
</tr>
<tr>
<td>Sounds good spoken out loud.</td>
<td>Is full of clauses and hard to say.</td>
</tr>
<tr>
<td>Is memorable.</td>
<td>Is forgettable.</td>
</tr>
<tr>
<td>Surprises.</td>
<td>Is dull.</td>
</tr>
<tr>
<td>Is actionable.</td>
<td>Can’t be quantified.</td>
</tr>
<tr>
<td>Is specific.</td>
<td>Is vague.</td>
</tr>
</tbody>
</table>
• Delivering on DISTINCTIVENESS
  • staff credentials
  • culturally representative and competent
  • Peer &/or Family-Driven
  • EBP’s
  • Awards, accreditation, endorsements

• Credibility

• Scale
• Important

• Driven by customer need:
  • Access
  • Safety
  • Stigma
  • Signage
  • Environment (value or not)
  • Effective space for what you are doing

• Competition & Marketshare
• Health care is becoming a team sport.

• Gone are the days of
  • solo medical practices
  • stand-alone clinics
  • segregated behavioral health networks
• The future is all about aligning with larger affiliates.

• These could be hospital-based systems, ACOs, IPAs, networks or cultivated close relationships.

• Your reputation in a retail environment is everything.

• You are your reputation - expect Due Diligence
• Are you ready to have your performance stats on the web?

• Are you willing to sign a contract today based on your performance?

• Consistent delivery - Diverse Measures & Reports
  • Volume has 1 definition - Value has infinite
  • front-line customer
  • payers
Treatment Dose
Comparing CAHS "All Outpatient" to Goal

Number of Clients

Modal Outpatient Visits

# of Clients CAHS 1-10  # Client Goal
Treatment Dose: A clinical and a financial essential element
Outcomes
Satisfied
Am I on-track?
What are my outcomes?
What’s measures matters.
Measure what matters!

On Grade Level
School Attendance
Achieving Developmental Milestones
Has Vocational Path
High School Graduation

Chronic Health Condition Well Managed
Part or Full Time Employment
Living in own home or apartment
Has Vocational Path
Life Expectancy that of nondisabled Peer
Be the First to Know Your Performance

• The Division of Health Care Finance and Policy (DHCFP) Behavioral Health Report Card
  http://dhcfp.nv.gov/Pgms/CPT/BHSreports/BHreportcard/BHSReportCard/

• California Dashboard
  http://www.dhcs.ca.gov/services/Pages/MngdCarePerformDashboard.aspx

• Oregon Dashboard
  http://www.oregon.gov/oha/amh/Pages/bhmetrics.aspx

• Arizona Dashboard
  https://www.azahcccs.gov/Resources/Reports/dashbo ard.html
Coordination Performance Indicators

Select Discharge Year: 2016  Select Age Group: All Age Groups  Select Level of Care: MH Inpatient

Adult - Average Length of Stay - MH Inpatient

Adult - Discharge to the Community Rate - MH Inpatient

Adult - 30 Day Readmission Rate - MH Inpatient

* Note: Text that is too long will end in ... and does not display completely. To see the complete verbiage, hover the mouse pointer over the text.
* Note: Text that is cut off will end in ... as it may not display completely. To see the complete verbiage, hover the mouse pointer over the text.
ICL LAB
Outcomes

- Significant improvements in blood pressure lipid profile (total cholesterol, LDL, HDL, triglycerides), breath CO

- Findings robust across racial/ethnic groups
• Significant reductions in emergency and inpatient service utilization
• 96% of ICL clients believe they can make changes to improve their physical health
7 Things Mindful People Do Differently

1. Approach everyday things with curiosity—and savor them

2. Forgive their mistakes—big or small

3. Show gratitude for good moments—and grace for bad ones

4. Practice compassion and nurture connections

5. Make peace with imperfection—inside and out

6. Embrace vulnerability by trusting others—and themselves

7. Accept—and appreciate—that things come and go

List compiled by Elisha Goldstein, Ph.D., psychologist, author of The Now Effect
MANAGING THROUGH DASHBOARDS

THE CHILD CENTER OF NY
Strengthening Family. Building Community.
IMPACT OF DASHBOARDS ON CLINICS

Face-to-face time
Increased by 44%
From 18 to 26 hrs/wk

Broken appts
Decreased By 35%
From 26% to 17%

Collection rates
Increased by 5%
From 92% to 97%
IMPACT OF DASHBOARDS ON HOME VISITING (SHORT TERM)

- **Face-to-face time**: Increased by 27% from 167 to 212 hrs/mo
- **Billable units**: Increased by 11% from 36 to 40 units/mo
- **IIH sessions**: Increased by 129% from 35 to 80 sessions/mo
DASHBOARD DEVELOPMENT

1. **Process flow** of operations and data systems
2. **Identify key metrics** and operational pain points
3. **Research and implement operational best practices**
4. **Track all program activity electronically**
5. **Develop dashboards** to assist in managing culture change
6. As operations become efficient, focus on outcomes
A management summary allows senior management to quickly and consistently keep their pulse on the performance of programs at a level that summarizes the key metrics. The CEO can view this document and, in a matter of seconds, identify key success or problems.
A program summary provides program directors an aggregate level view of their program. This helps to understand populations, geographies, service mix, and other metrics at a clinic-wide level to ensure that expectations are met.
By analyzing staff performance down to the level of each worker, management never has to guess which staff are top performers. Also, making dashboards fully transparent to all staff allows for a sharing of best practices. Viewing each staff’s performance also highlights exactly where problems exist.
By producing caseload reports that analyze client activity managers are able to quickly spot issues like late treatment plans, lack of visits, service types, etc. By analyzing caseloads in home visiting programs, managers are also able to visually see if catchment areas are being maintained, when visits are being concentrated during the month, and other caseload trends.
When developing a new program, it is important to understand, down to the hour, how your direct care workers will spend their time. This time study will allow you to develop productivity targets, determine very accurate revenue projections, as well as inform job descriptions.
When designing the structure of a program, having an interactive analytical tool that allows management to experiment with staffing patterns, caseload sizes, salaries, etc. is crucial to ensuring that a new program is fiscally viable and scalable.
FINANCIAL DASHBOARDS

Contract Billing Summary

As dashboards highlight the accomplishments and assist programs in fixing program issues, it is important to ensure that the efforts of the programs are mirrored by equal efforts by central support staff. Contract billing, in particular, needs to be carefully monitored to ensure fiscal viability and program success.

<table>
<thead>
<tr>
<th>Accountant</th>
<th># of Funds</th>
<th>FY17 Annual Budget</th>
<th>FY17 YTD Budget Through January 2017</th>
<th>FY17 YTD Actual Through January 2017</th>
<th>FY17 Actual / FY17 Budgeted Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anakin Skywalker</td>
<td>15</td>
<td>$10,523,563</td>
<td>$6,138,745</td>
<td>$6,015,970.18</td>
<td>98%</td>
</tr>
<tr>
<td>Leia Organa</td>
<td>11</td>
<td>$3,526,483</td>
<td>$2,057,115</td>
<td>$2,098,257</td>
<td>102%</td>
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<tr>
<td>Luke Skywalker</td>
<td>13</td>
<td>$12,563,598</td>
<td>$7,328,766</td>
<td>$6,302,738</td>
<td>85%</td>
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<tr>
<td>Padme Amidala</td>
<td>12</td>
<td>$11,570,941</td>
<td>$6,749,715</td>
<td>$4,387,315</td>
<td>65%</td>
</tr>
<tr>
<td>Obi-Wan Kenobi</td>
<td>12</td>
<td>$7,562,351</td>
<td>$4,411,371</td>
<td>$4,234,917</td>
<td>96%</td>
</tr>
<tr>
<td>Boba Fett</td>
<td>9</td>
<td>$4,166,351</td>
<td>$2,430,721</td>
<td>$2,552,257</td>
<td>105%</td>
</tr>
</tbody>
</table>
• What is your cost?
  • Fixed vs. Variable
  • Stability of costs
  • Relationship to what someone will pay

• Lean Processes – Waste the enemy
  • The enemy is often us
  • Identifying transitional barriers and solutions
  • Regulation, rates, etc.
• In RETAIL, you get what you pay for

• Quality is a variable, but is inextricably linked with what the buyer is willing to pay.
  • Come back to your mission statement (true north)
  • Early and innovative (Apple)
  • Strong value proposition (eye of the buyer)
  • Capacity to report, bill timely and with accuracy
• Does anyone know you exist?

• Look at messaging from the eye, ears and perspective of your customer. Not yourself.
  • Rarely do people know or care about BH until it effects them

• Keep it simple, real and DISTINCTIVE
• What’s hot - CBOs, SDH, etc

• Many have had bad experiences with BH or your Agency.
  • How to prevent
  • How to counter
Start Working the Distinctiveness Wheel

Lose your Agent of Government Thinking!

Work To Close the Gap Between Current/Future State

Become a Flourishing Business For Good

Millennial Leader-Steps

Adopt Millennial Nonprofit Thinking
Risk Awareness & Protective Factors
There were problems in the “Agent of Government” phase.

Government and we are blind to some of the problems.

Nonprofits have thick reputational veneers.

Government, Foundations, Accreditation Organizations or Associations have not ‘cracked the code’ to identify agencies at profound risk.
Influences To Nonprofit Success or Failure

External Factors

- Environment
  - Health and Human Services Markets
- Government
- Philanthropy
- Access to Capital

Agency Operations

- Leadership
  - Executive
  - Governance
- Capacity
  - People
  - Systems
• Transition will NOT be swift nor linear
  • Providers will operate with multiple incentives and payment models
  • Increased exposure to risk
• FUNDAMENTAL CHANGE IN OUR THINKING AND PRACTICE
  • Solutions needed beyond volume growth or cost reduction
  • Delivery of outcomes to keep market share
  • Being highly efficient at delivering excellent care to strengthen contract position
  • Know your organization - internal due diligence
1. Audit
2. Organizational Culture
3. Information Technology
Capital Area Human Services
2, 4615 Government St, Baton Rouge, LA

4.2 ★★★★☆ 18 reviews

marven washington
1 photo
★★★★★ In the last week

John Landry
Local Guide • 5 reviews • 50 photos
★★★★★ a week ago

Izaak Brumley
Local Guide • 33 reviews • 240 photos
★★★★★ 2 weeks ago
CAHSD Ratings and Trends

Overall: 3.3

- Recommend to a friend: 73%
- CEO Approval: 67%
- Positive Business Outlook: 37%

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Rating</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture &amp; Values</td>
<td>3.1</td>
<td></td>
</tr>
<tr>
<td>Work/Life Balance</td>
<td>3.4</td>
<td></td>
</tr>
<tr>
<td>Senior Management</td>
<td>2.7</td>
<td></td>
</tr>
<tr>
<td>Comp &amp; Benefits</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td>Career Opportunities</td>
<td>2.9</td>
<td></td>
</tr>
</tbody>
</table>

Overall Trend

Overall Distribution

- 5 Stars
- 4 Stars
- 1 Star
<table>
<thead>
<tr>
<th>Lives Affected</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>405,860</td>
<td>Health Insurance (Adults enrolled in Medicaid Expansion as of February 27, 2017)</td>
</tr>
<tr>
<td>62,742</td>
<td>Preventive Care (Adults who received preventive healthcare or new patient services)</td>
</tr>
<tr>
<td>5,707</td>
<td>Breast Cancer (Women who've gotten screening or diagnostic breast imaging)</td>
</tr>
<tr>
<td>74</td>
<td>Breast Cancer (Women diagnosed with breast cancer as a result of this imaging)</td>
</tr>
<tr>
<td>5,858</td>
<td>Colon Cancer (Adults who received colon cancer screening)</td>
</tr>
<tr>
<td>1,670</td>
<td>Colon Cancer (Adults with colon polyps removed: colon cancer averted)</td>
</tr>
<tr>
<td>64</td>
<td>Colon Cancer (Adults diagnosed with colon cancer as a result of this screening)</td>
</tr>
<tr>
<td>1,319</td>
<td>Newly Diagnosed Diabetes (Adults newly diagnosed and now treated for Diabetes)</td>
</tr>
</tbody>
</table>
# Profit & Loss Statement Template

**[Company Name]**

[Street Address], [City, ST ZIP Code]

[Phone: 555-555-5555] [Fax: 123-123-123456]

[abc@example.com]

**Profit & Loss Statement**  
For the Period Ended _____________

<table>
<thead>
<tr>
<th>Income</th>
<th>$</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>0000000</td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td>0000000</td>
<td></td>
</tr>
<tr>
<td>Other Income</td>
<td>00000</td>
<td></td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td></td>
<td>0000000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>$</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>0000000</td>
<td></td>
</tr>
<tr>
<td>Advertising</td>
<td>0000000</td>
<td></td>
</tr>
<tr>
<td>Assets Small</td>
<td>0000000</td>
<td></td>
</tr>
<tr>
<td>Bank Charges</td>
<td>0000000</td>
<td></td>
</tr>
<tr>
<td>Cost of Goods Sold</td>
<td>00000</td>
<td></td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td></td>
<td>0000000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profit/Loss</th>
<th>$</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0000000</td>
<td></td>
</tr>
</tbody>
</table>


HOW TO LEAD EXTRAVERTS

1. Let them dive right in
2. Encourage their enthusiasm
3. Let them speak to think
4. Listen to their many ideas
5. Let them multi-task
6. Respect their independent nature
7. LET THEM SHINE

HOW TO LEAD INTROVERTS

1. Let them think to speak
2. Give them time to make decisions
3. Respect their private nature
4. Appreciate their need to work alone
5. Carefully listen to them
6. Help them learn at their own pace
7. LET THEM SHINE
Everyone has a Why

Why do you get up in the morning? Why does your organization exist? Your Why is the purpose, cause or belief that inspires you to do what you do. When you think, act and communicate starting with Why, you can inspire others.

Find your Why
The Golden Circle

What

How

Why
Other Reflections...

Real Time Data
EHR Maximization
Disaster Planning Service Delivery
Too many of these problems are diseases of despair that spring from deficits of hope.

Dr. Vivek Murthy
US Surgeon General
2013-2017
Thank you!

Kristin Woodlock
Woodlockk@gmail.com
917-244-4221
Start the day with a few moments of 'conscious awareness'.

Practice active listening
Listen carefully to what is being said, process what was said, and then reply thoughtfully and intentionally.

Notice your body language
Body language speaks volumes. It sets your intention to both yourself and your colleagues.

Watch the tone and language in your communications
Be mindful of the message you intend to send. At times, your intention may not match your intended outcome.

Eat mindfully
Take small bites. Chew your food slowly. Notice the flavours and textures.

When stressed, take a time out
Get some fresh air. A short break may break your thought cycle and change your perspective on things.

Respect all people, even if you may not agree with their ideas
Everybody has the right to be heard. Listening to alternate opinions may help you with your own.

When communicating, remember to THINK:
• Is it True?
• Is it Helpful?
• Is it Inspiring?
• Is it Necessary?
• Is it Kind?

Stay in the moment!
The past has already happened. The future has yet to occur. Check in with yourself. Now is what we have!

Talk to us to see what mindfulness can do for you!