

ADVANCING THE FINANCIAL STRENGTH OF HEALTH CENTERS

Financial and Operational Trainings

MLCHC Pre-Conference Session
Sea Crest Beach Hotel, Falmouth, MA
May 2, 2017

Agenda

8:45 – 9:45 AM Registration and Continental Breakfast

Morning Program: *Advancing Financial Strength*

9:45 – 10:15 AM Welcome and Overview MLCHC, Capital Link

10:15 – 11:30 AM *Managing with Metrics and Performance Evaluation Profiles* Capital Link

11:30 – 11:45 AM Break

11:45 AM – 1:00 PM *Identifying the Drivers of Financial Strength, Patient and Staff Satisfaction* HealthMETRICS

1:00 – 1:30 PM Lunch is Served

1:30 – 1:45 PM Transition to Afternoon Breakout Sessions

Afternoon Program: *Advancing Financial Strength*

1:45 – 3:00 PM *Actions to Influence Performance Improvement* Capital Link/HealthMETRICS

Breakout Sessions

- Connecting your Performance Evaluation Profile Results to Your Objectives
- Strategies for Impacting Cost of Care through Process Improvement

3:00 – 3:15 PM Break

3:15 – 4:30 PM *Actions to Influence Performance Improvement* Capital Link/HealthMETRICS

Breakout Sessions

- Connecting your Performance Evaluation Profile Results to Your Objectives
- Strategies for Impacting Cost of Care through Process Improvement

4:30 – 5:00 PM Program Close and Next Steps MLCHC, Capital Link

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Syllabus

Morning Program: *Advancing Financial Strength*

Session Introduction—9:45-10:15 AM Ellen Hafer, Chief Operating Officer, Massachusetts League of Community Health Centers and Susan Petrie, Chief Operating Officer, Capital Link

In addition to providing a general introduction to the day, this session will provide an overview of a proposed year-long training program to advance the financial and operational strength of Massachusetts health centers. At the conclusion of the day, participants will be asked to gauge their interest in participating in this learning opportunity during FY18, if the League were to offer it.

Managing with Metrics and Performance Evaluation Profiles—10:15-11:30 AM Allison Coleman, Chief Executive Officer, and Dan Woodman, Project Consultant, Capital Link

Purpose: In an era of unprecedented uncertainty, it's increasingly important for health centers to measure, monitor, and act upon organizational data and better understand the intersections between financial, operational, and clinical performance. This session will describe the hallmarks of success of some of the highest performing health centers in the country and provide a comparative overview of the results of Performance Evaluation Profiles for Massachusetts health centers recently completed by Capital Link. The speakers will also include a brief overview of scenario and contingency planning to help health centers and board members prepare for an uncertain future.

Audience: CEOs, CFOs, COOs, CMOs, Board Members, and staff interested in learning more about the relationship between clinical and financial success and opportunities for performance improvement

Learning Objectives:

1. Learn the importance of measurement and benchmarking for turning data into actions.
2. Identify important metrics for assessing financial and operational performance and potential improvements.
3. Understand areas of strength and weakness among Massachusetts' health centers.
4. Understand the basics of scenario and contingency planning to ensure health center financial viability.

Identifying the Drivers of Financial Strength, Patient and Staff Satisfaction—11:45 AM -1:00 PM Charles Moore, President and CEO, HealthMETRICS

Purpose: Healthcare managers struggle with the need to manage the cost of care without jeopardizing patient and staff satisfaction or quality of care. Often it is perceived that there is a trade-off between these items. By understanding the specific factors that most influence the cost and quality of care (drivers), it is possible to improve all variables simultaneously. This session will identify and explore the key elements that drive health center performance, linking specific steps in the process of care to cost and satisfaction outcomes. Understanding the relationship between the discrete steps in the process of care to outcomes provides managers with the insight needed to implement performance improvements. Common perceptions such as the idea that more provider time with a patient results in higher patient and staff satisfaction will be challenged. The session will also focus on benchmarking and ways to track key information through data dashboards.

Attendees: CEOs, CFOs, COOs, CMOs, Board Members, and staff interested in learning more about potential clinic efficiencies and opportunities for improving care delivery while maintaining quality excellence.

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Learning Objectives:

1. Identify the key variables that determine the efficiency in which clinical services are delivered.
2. Understand the most important elements in the process of delivering clinical services that influence patient and staff satisfaction.
3. Review key metrics and data dashboards for ongoing tracking and communication.
4. Understand the potential to optimize performance by managing the key variables that influence the cost and quality of care such that high quality clinical services are provided efficiently with excellent patient and staff satisfaction. Learn how performance can be altered to result in improvement to your center's net margin.

Afternoon Program: *Advancing Financial Strength*

Purpose: Using 75-minute timeslots, the presenters will facilitate small group trainings to build on the content shared in the morning session in two areas: (1) connecting Performance Evaluation Profile results to your objectives using financial scenario calculators, and (2) strategies for impacting cost of care through process improvement. Participants have the opportunity to attend both sessions, with half of the participants in each section. Health centers that are participating in a pilot effort to improve their performance will also share insights on effective strategies they are in the process of implementing at their centers.

Presenters:

Capital Link Staff: Allison Coleman, CEO; Susan Petrie, COO; Dan Woodman, Project Consultant
Capital Link's Industry Expert: Charles Moore, President of HealthMETRICS

Attendees: CEOs, CFOs, COOs, CMOs, Board Members, and staff interested in learning more about potential clinic efficiencies and opportunities for improving care delivery while maintaining quality excellence.

Learning Objectives:

1. Learn best practices and interventions for success from industry experts.
2. Enable peer discussion and ideas around real-world challenges and improvement opportunities.
3. Establish next steps for implementing optimal performance techniques.