

INFORMATION TO ACTION:

**PLANNING AND CHANGE
MANAGEMENT**

November 2017

Today's Speakers



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■ Mark Davis

- Executive Director, Ohio Provider Resource Association and the Center for Epidemiological Research for Individuals with Intellectual and Developmental Disabilities

Planning to Plan Webinar



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- Organization Vision
- Environmental Scan
- SWOT Analysis
- Champion Development

Learning Objectives

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- Understand how to use the data collected through an environmental scan and SWOT analysis to inform your organizations strategic plan
- Understand how different business tools can be used to help inform your organizational change and operational decisions
- Identify how your business intelligence can be used to communicate strategic direction to staff

Using Data to Inform Your Strategic Plan



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■ Data Sources

- Environmental scan
- SWOT analysis

■ Strategic Data Analysis

- What does the data tell you about your mission and vision?
 - Current
 - Relevant
 - Important

Mission Relevance and Clarity



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- Is your mission current to the needs of the people you serve, your ultimate customers, to payers, to policy-makers?
- Is your mission relevant, within the context of the data you collected?
- Are you doing important work, that is having an impact on the people you serve?

Making a Difference



“Everybody talks about the weather, but nobody does anything about it.”

Mark Twain

Extinction or Growth

- Focus on products rather than customers
- What business are you really in?
 - Railroads
 - Movies
 - Glass

Theodore Levitt, Marketing Myopia, Harvard Business Review, 1960.

Extinction or Growth - Railroads



- Why did the railroads stop growing?
 - Because the need for passenger and freight transportation declined?
 - That grew.

- **They incorrectly defined their business**
 - They assumed they were in the railroad business rather than the transportation business.

- Consider:
 - What is your business?
 - Are you product oriented or customer oriented?

Extinction or Growth - Movies



- Entertainment: The advent of television...
 - All the established film companies went through drastic reorganizations.
 - Some simply disappeared.
 - All were in trouble.

- **They incorrectly defined their business**
 - They assumed they were in the movie business rather than the entertainment business.

- Consider:
 - Is there an opportunity to expand your business?

Watchfulness

“It is constant watchfulness for opportunities to apply their technical know-how to the creation of customer-satisfying uses that accounts for their prodigious output of successful new products. “

Levitt, ibid.

What Business are You Really In?



- Business tools to listen to your customers and staff
 - Small group discussions
 - Using people-first language
 - At times convenient to them
 - Ask relevant questions and allow the discussion to happen in an organic manner
 - Online surveys
 - <https://www.pcmag.com/article2/0,2817,2494737,00.asp>
 - Social media polls and trolls
 - Payer and policy-makers input

What Business are You Really In?



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- What does your staff think your agency provides?
- Where are you on the continuum of being a service-focused agency to being a customer-focused agency?
- What do your customers want that you're not giving them?
- How can you better leverage technology to give your customers what they want?
- What are the potential impacts on your agency's strategic vision?

What is Your Value Proposition?



Know Your Customer



“A frog in love would not be enchanted to learn that her beloved had turned into Prince Charming.”

Mason Cooley

Alignment

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- How do your strategic plan and services align with your (new) mission and vision?
- Are you committed to your mission?
- Are you and your leadership team clear on your mission?
- Does your strategic plan center around your mission?
- Do your staff, customers and board members understand your mission and strategic direction?
- If not, revisit with your organization's leaders

Strategic Planning

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- “Prior planning prevents poor performance” (R. DiRusso)
- Inclusive, broad-reaching inputs
 - ▣ Customers (electronic feedback/voting)
 - ▣ Staff
 - ▣ Payers
 - ▣ Policy-Makers
 - ▣ Other sources (research, regulations, waiver applications)

Strategic Planning

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- Board
 - ▣ SWOT
 - Data
 - Materials
 - Guided conversation
 - ▣ Draft strategic plan
 - Keep it simple, focused on priorities
- Customer, payer, staff, policy-maker feedback on draft
- Finalize strategic plan
- Dynamic document

Strategic Plan



Mission Statement		
To support and provide advocacy for community-based service providers to ensure the availability of programs, services, and funding adequate to support and assist individuals with developmental disabilities as they strive to achieve a life of increasing independence, productivity and integration.		
2017-2018 Focus Areas & Goals		
Workforce Sustainability	Quality, Accountable and Sustainable System Reform.	Efficiencies and Simplification
<ol style="list-style-type: none"> 1. Aggressively pursue maximum possible provider reimbursement to result in an increase in workforce wages and benefits. Ultimate goal of average DSP wage of 200% of the federal poverty level. 2. Collaborate with system partners to re-invest county board and state savings in wages, training, supervision, other related workforce issues, and waiting list. 3. Implement immediate actions to attract, train and retain people in the direct support profession to build and maintain critical provider capacity. Advocate for the elimination of regulations that negatively impact the DSP's experience of work and their ability to impact the lives of people with IDD. 	<ol style="list-style-type: none"> 1. Advocate for adequate funding for all ICF's and waiver services, including responsible downsizing of ICF's, setting size changes and provider incentives to accomplish person centered planning. 2. Advocate for people with IDD to have the same integrated community employment opportunities as the general Ohio population while transforming day array services to community engagement. 3. Identify opportunities to improve people with IDD's health and experience of care, while seeking to reduce the per capita cost of care. 	<ol style="list-style-type: none"> 1. Work with system partners to identify and aggressively advocate for the change or elimination of regulations and practices that are not useful, necessary, or improve the lives of people with IDD. 2. Work with system partners to develop and implement simple reimbursement systems. 3. Work with system partners to simplify and implement uniform state reviews of providers, including national accreditation and deemings for licensure and county board accreditation, ODH/DODD review process of ICF's, audits and HCBS heightened scrutiny.

Avoid Mission Creep

- Maintaining your mission takes strategic discipline
- Regularly review the scope of your organization's work in light of your mission and strategic plan
 - ▣ Alignment of work to your mission
 - ▣ Alignment of your work to your strategic plan (squirrel)
- Develop measurable benchmarks with real-time Business Intelligence reporting
- Revise or reject, dynamic and data-informed process

Mission Metrics

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- How do you know if you are successful?
- Business metrics
 - Customer outcomes achieved
 - Customer growth and retention
 - Staff retention
 - Contract compliance
 - Revenue
 - Operating productivity
 - Overhead cost
 - Monthly profit or loss

Business Intelligence

- Business Intelligence prepares an organization to identify and to prepare for significant trends in their profession
- What are the trends for your primary services and potential services (customer demand, pricing, margins, cost, state/federal policy changes)?
 - Shared living
 - Technology-enabled supports
 - Employment services
 - Integrated care

Business Intelligence

- Develop multiple ways to communicate strategic direction to staff
- Business Intelligence
 - ▣ Develop and share a scorecard for your organization
 - Keep it simple, with clear measurables
 - ▣ Include strategic direction articles in every newsletter
 - Use analytics to measure click-through rates
 - Analyze click-through rates and modify articles
 - Include pictures, use people-first language, use graphics that are appealing to the eye, start article with a summary

Balanced Scorecard

- Balanced Scorecard
 - ▣ Kaplan and Norton 1992
- Answers four basic questions
 - ▣ Customer perspective (How do customers see us)
 - ▣ Internal business perspective (What must we excel at)
 - ▣ Innovation and learning perspective (Can we continue to improve and create value)
 - ▣ Financial perspective (How do we look to our shareholders)

Balanced Scorecard

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- Quality
- Customer Service
- Financial
- Quality of worklife

Ultimate Goals

- Current, Relevant and Important Mission and Vision
- Data and Customer-Informed Strategic Plan Aligned with Mission and Vision
- Operational Plan Aligned with Strategic Plan
- Data Collection and Analysis Systems to Stay the Course
- Effective Communication Strategies to Keep Staff Informed

Monthly Webinar Series



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- December 20, 2017*: Developing Relationships with Potential Payers and Community Partners
- January 24, 2018: Understanding and Maximizing Your Financial Position
- February 28, 2018: Articulating Your Business Case
- March 28, 2018: Negotiating and Contracting

**Webinars usually held the 4th Wednesday of every month. December's webinar will be held on the 3rd Wednesday.*

Thank You!



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