

ADVANCING STATES



Leadership, innovation, collaboration
for state Aging and Disability agencies

Indiana Business Acumen Training: Process Improvement

May 3, 2022

Quick Housekeeping



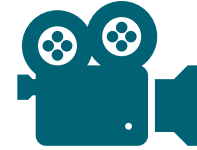
Everyone is muted



Use the
“raise hand”
button to speak



Chat it up!



We are recording



Closed captioning

Agenda

- Introductions
- Process Improvement Practices
 - SWOT Analysis
 - Basics
 - Using SWOT Analysis Results
 - Workflow processes
 - Time studies
 - Job aids
- Q&A

Introductions

- April Young is the Senior Director of Business Acumen for ADvancing States.
- Previously, she was the Senior Director for National Core Indicators-Aging & Disabilities at ADvancing States. Prior to that, she was a Policy Advisor at the Texas Health and Human Services Commission, working on long-term services and supports policy as well as stakeholder engagement.
- April has worked in the home and community-based services arena since 2006.



Introductions

- Marisa Scala-Foley is Director of USAging's Aging and Disability Business Institute
- Previously, she served as Director of the Office of Integrated Care Innovations in the Center for Integrated Programs at the U.S. Administration for Community Living (ACL), where she managed the agency's efforts to build the capacity of state and community-based organizations for delivery system reform
- She has worked her entire career in the field of aging on issues related to health care and long-term services and supports



What is a Community-based Organization (CBO)?

- CBOs can be any of the following:
 - Community non-profits
 - Area Agencies on Aging
 - Centers for Independent Living (CILs)
 - HCBS providers
 - Nutrition or transportation providers
 - Attendant care service providers

Business Acumen Toolkit for Community-Based Organizations



SWOT Analysis



SWOT Analysis



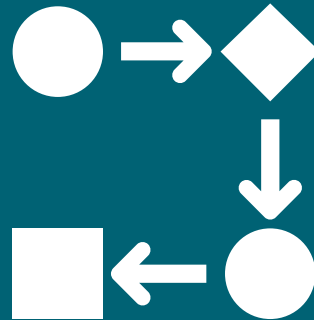
SWOT Analysis Template

	Strengths	Weaknesses	Opportunities	Threats
Federal, state, local government				
Payers				
Competitors				
Collaborators				
Demographics				
Technology				

SWOT Analysis Utilization

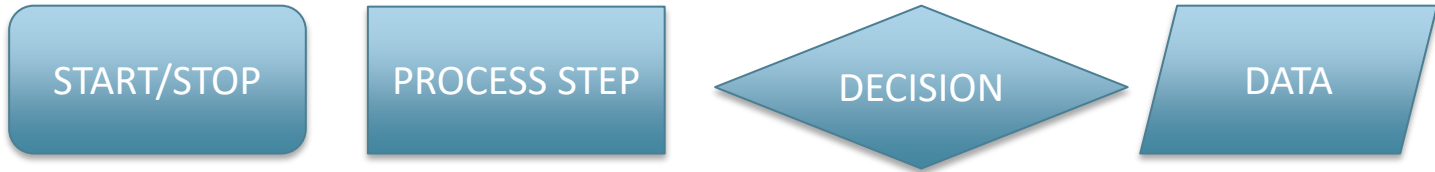
- Example
 - CBO A found in their SWOT analysis **one of their weaknesses was tracking hospitalizations**
 - CBO A also **knew care coordination was important** to MCE B's quality outcomes tracking
 - CBO A decided to include this issue in one of their strategic goals and **instituted a process** to track hospitalization discharges and transitions back to the home.
 - CBO A **tracked this goal and updated progress** on the goal with information from their SWOT analysis six months later.
 - CBO A met their goal and **shared their outcomes with MCE B** and incorporated this information into their outreach materials with other MCEs/potential payers.
 - CBO A's **value to MCE B grew** as they became a more trusted partner.

Workflow Processes

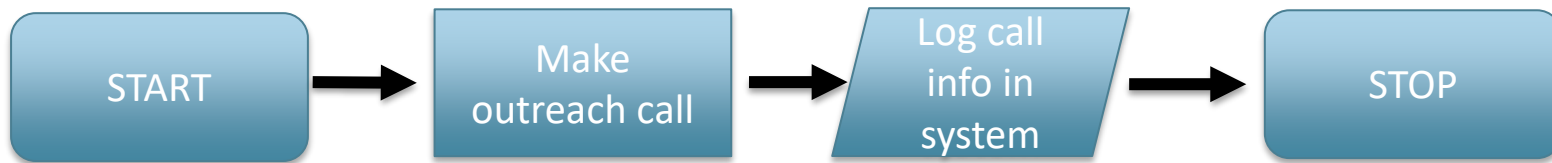


Workflow Processes

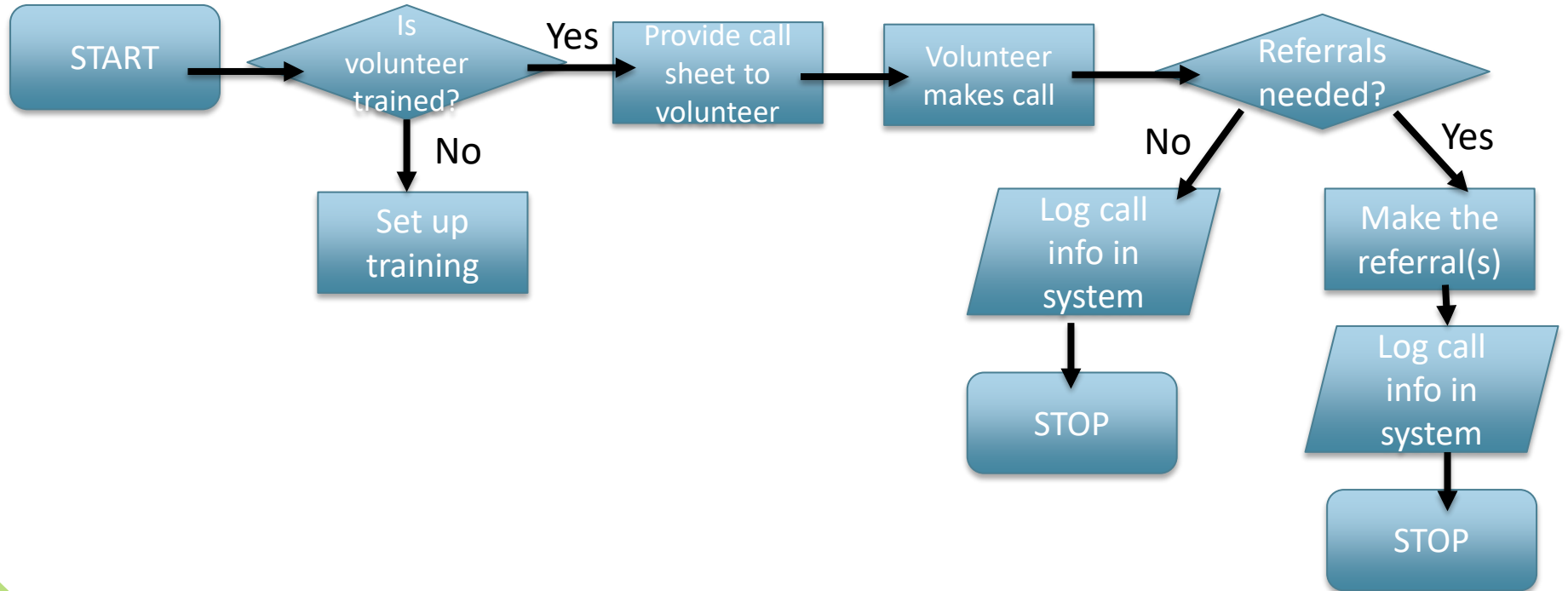
- Flow charts – Common shapes:



- Simple example (outreach calls):



Workflow Processes



Workflow Processes

- From the Aging and Disability Institute
- Real life example of one AAA using process mapping and workflows to identify inefficiencies and opportunities for streamlining



Aging and disability community-based organizations (CBOs) that are pursuing and/or engaging in health care contracting work must operate efficiently to lead successful partnerships and establish new relationships with health care entities. One way CBOs can attract and become more viable partners for health care entities is by properly managing data and workflows. This makes developing a comprehensive understanding of internal data systems, the data being collected and how this data can be leveraged important for any CBO seeking to improve quality and attract health care partners. This Success Story explores how one Area Agency on Aging (AAA) has used process mapping tools to streamline and improve its services.

What is Process Mapping?

One way CBOs can illustrate system processes is by developing a customizable tool or diagram to help during internal decision-making processes and when determining how to best address client needs.

could justify changing workflow processes to increase efficiency without compromising integrity.

Process Mapping in Action

Pima Council on Aging (PCOA), a AAA in Tucson, AZ, has used process mapping to visually describe the steps and tasks that are part of its operations as it streamlined processes and standardized data collection. PCOA hoped to purchase client-tracking database software, but first wanted to grasp what data it would need to feed into a new system and what data staff were entering into existing databases (e.g., Excel spreadsheets and the statewide Division of Aging and Adult Services Reporting System (DAARS) database) first. PCOA

PCOA was entering the following data on clients/consumers into existing databases:

Time Studies



Time Studies

- A time study is exactly what it sounds like.
 - How long does each step take?
 - How long should it take?
 - How much variance is there between staff and why?

Time Studies

Occurrence Count	Date	Start Time	Stop Time	Duration (in minutes)	Staff
1	1/5/19	9:15 a.m.	9:35 a.m.	20	Bob
2	1/5/19	9:25 a.m.	9:37 a.m.	12	Jane
3	1/6/19	1:05 p.m.	1:14 p.m.	9	Jane
4	1/7/19	10:45 a.m.	11:00 a.m.	15	Jane
5	1/10/19	9:00 a.m.	9:23 a.m.	23	Bob
6	1/10/19	11:25 a.m.	11:50 a.m.	25	Bob
7	1/11/19	3:55 p.m.	4:13 p.m.	18	Jane
		Jane	Bob	Total	
	Total Count	4	3	7	
	Total Time	54	68	122	
	Average Time	13.5	22.67	17.43	

Time Studies

Occurrence Tally	Date	Start Time	Stop Time	Occurrence Count (from tally)	Staff
	1/5/19	9:00 a.m.	10:00 a.m.	25	Bob
	1/5/19	9:00 a.m.	10:00 a.m.	19	Jane
	1/5/19	1:00 p.m.	2:00 p.m.	29	Bob
	1/5/19	1:00 p.m.	2:00 p.m.	44	Jane
	1/5/19	4:00 p.m.	5:00 p.m.	39	Bob
	1/5/19	4:00 p.m.	5:00 p.m.	34	Jane
		Jane	Bob	Total	
Total Count		97	93	190	
Total Time (hours)		3	3	6	
Average Per Hour		32.3	31	31.67	

Workflow Processes and Time Studies

- Together, process maps and time studies provide a snapshot of how tasks are currently done and where processes can be improved.
 - How does the activity contribute to the organization's goals?
 - Is your organization working as efficiently as it can?
 - Do your reimbursement expectations appropriately reflect your costs?
 - Are the right people in the right roles?
 - Are there similarities to other processes?

Job Aids



Job Aids

- Checklists
- Decision tables
- Flowcharts
- Reference sheets
- Procedure manuals

Questions & Discussion



Next Session: Measures

3-4pm Eastern

Tuesday, May 17, 2022



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