



Using Community Balanced Scorecards to Improve Public Health Collaboration

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Results That Matter Team: www.RTMteam.net
of Epstein & Fass Associates

Insightformation: www.insightformation.com

Webinar October 6, 2009

Introduction



Epstein & Fass Associates: Results That Matter Team www.RTMteam.net

- Measuring & improving public and nonprofit performance since 1985
- Public Health Foundation Consulting Team
- Community Balanced Scorecard project with Public Health Partnerships
- Featured in The Public Health Quality Improvement Handbook

INSIGHT

FORMATION Insightformation, Inc. www.insightformation.com

- Leveraging strategic management tools & technologies
- "Communities of HOPE" in Detroit
- Community efforts to improve educational success and public health
- InsightVision software—on-line Strategic Management System

Quick Agenda

- Challenges of PH Organizations
- New Tools and Experiences Using Them
- Opportunities to Use these Tools:
 Starting New Projects

Challenges of Public Health Organizations

- Need to effectively collaborate with multiple organizations to improve public health outcomes
- Managing the on-going implementation of a collaborative strategy can be overwhelming

More Challenges and an Opportunity

- Current tools (MAPP, standards-based assessments, QI) and coming accreditation are useful, but:
 - Identify more opportunities for improvement than can be addressed with current resources.
 - Use of the Tools tends to be fragmented
- \$373 million in new grants for "Communities
 Putting Prevention to Work" emphasize
 partnerships across communities working together

Strategic Plan Documents Are Not Enough



M.B.B.D.

Managing

By

Big

Documents

Doesn't Work!

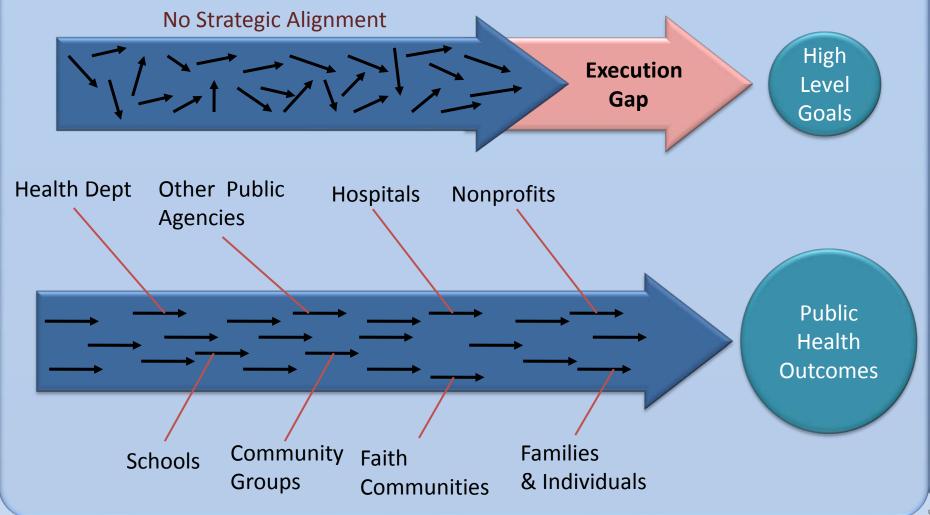
- Too big for most people to read or regularly review
- Yet without enough details for most partners
- Overwhelming, without clear pathway for action
- Static (PDF or Paper)

Do Big Meetings Lead to Execution?



Power of Strategic Alignment from Balanced Scorecards

Strategy Maps and BSC to improve the Alignment and Execution of Strategies



Key Questions:



- How to choose where to focus improvement efforts?
- How to pick changes that reinforce each other?
- How to manage the complexity of these challenges to improve public health outcomes?
- How do you demonstrate advanced levels of collaboration?

New Solutions

- Community Balanced Scorecards
 - Focus and manage strategic QI efforts
 - Clearly communicate strategy to recruit partners and clarify roles
 - Engage community partners in a common strategy to improve PH outcomes
- Technologies to Support Collaboration
 - InsightVision Strategic Management System
 - Integrated use of Wiki Technology
 - Manage the information in a consistent structure
 - Allows scaling-up of efforts
 - Streamline and enhance community partnerships

The Balanced Scorecard (BSC) ...

- Is an integrated strategic planning and management system traditionally focused on one organization
- Communicates vision, mission, and strategy to stakeholders and employees
- Maps strategies based on cause & effect assumptions across different perspectives or "views."
- Aligns day-to-day work to the strategy
- Provides a disciplined framework for measuring strategic performance as viewed from those different perspectives.

Community Balanced Scorecard (CBSC)

- Combines the community building power of effective collaborations with the strategy alignment of balanced scorecards
 - Pulls the community together around common outcomes
 - Leverages assets from all sectors
 - Aligns key community collaborators behind a common strategy for faster, measurable results
 - Creates mutual accountability for results
- Intended for the many important issues in communities and regions that cannot be resolved by one organization or sector.

Balanced Scorecards and Quality Improvement (QI)



The Balanced Scorecard is a telescope.

QI is a microscope.



-- Chief Medical Director, Duke Children's Hospital

CBSC, QI, Collaborations, & Assessments

Improved Public Health Outcomes



Information & Collaborative Relationships Based on, e.g.: MAPP, Standards-based Assessments

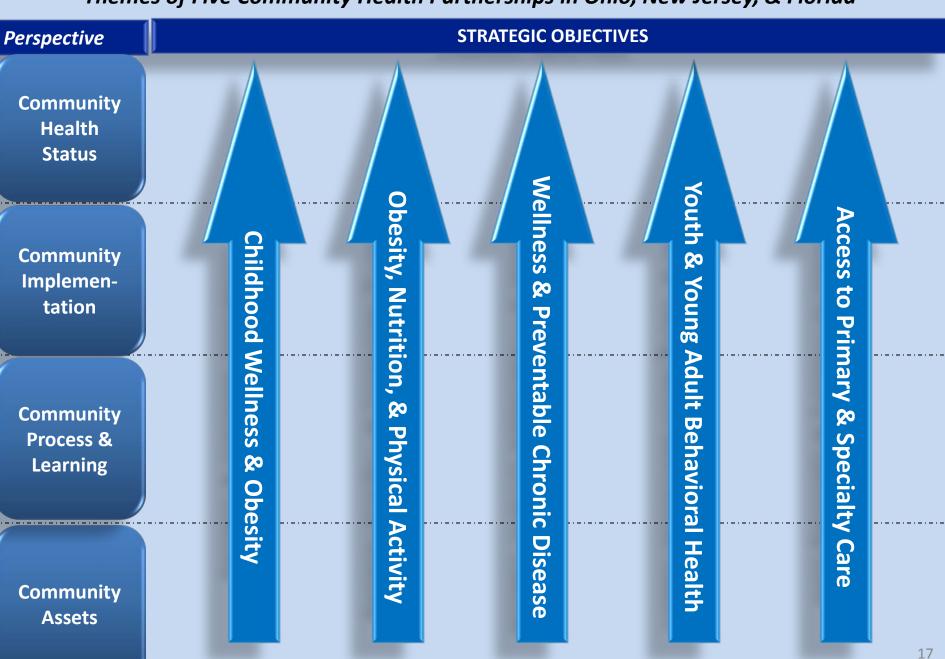
Community Balanced Scorecard Components



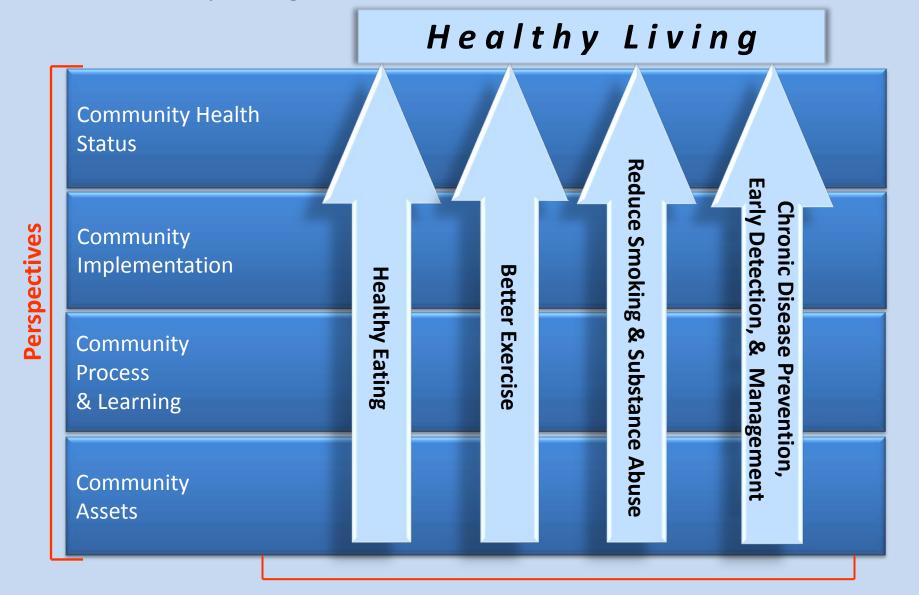
Suggested **Perspectives for Public Health Community Community Health Status Balanced Scorecards Community Implementation Community Process & Learning**

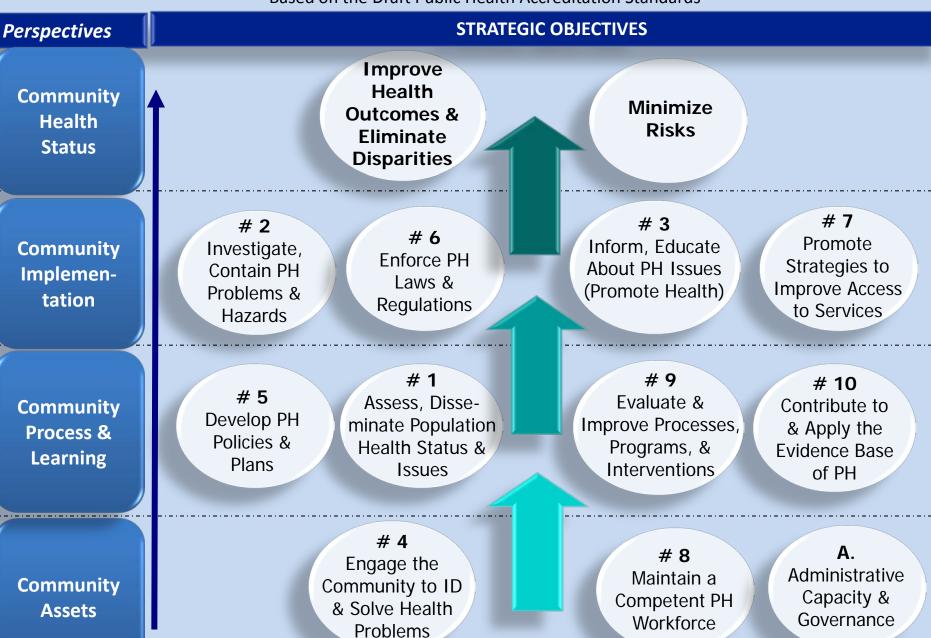
Community Assets

Themes of Five Community Health Partnerships in Ohio, New Jersey, & Florida



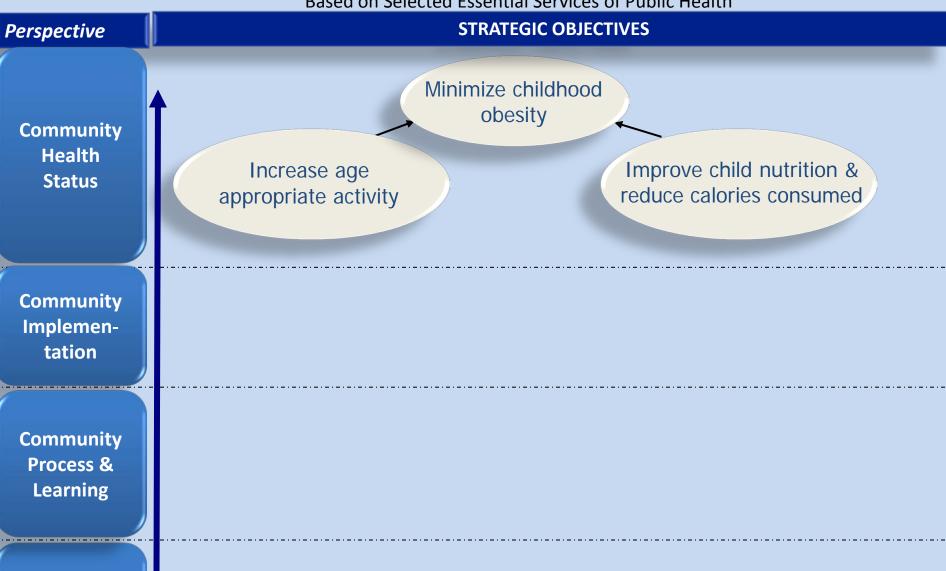
"Healthy Living" Themes from Communities of HOPE





Potential Community Strategy Map to Reduce Childhood Obesity

Based on Selected Essential Services of Public Health



Community Assets

Potential Community Strategy Map to Reduce Childhood Obesity

Based on Selected Essential Services of Public Health



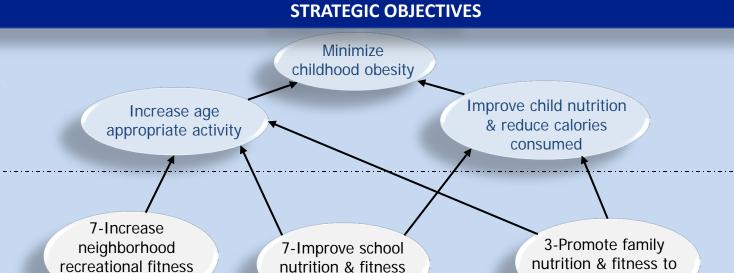
Community Health Status

Community Implementation

services

Community
Process &
Learning

Community
Assets



activities

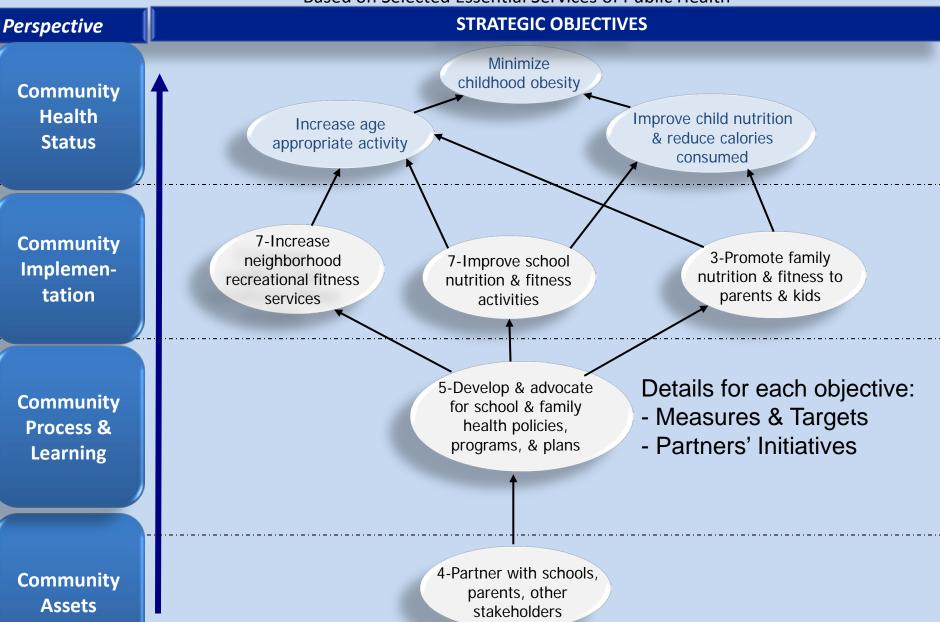
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parents & kids

Potential Community Strategy Map to Reduce Childhood Obesity

Based on Selected Essential Services of Public Health



<u>Vision</u>: Healthier community, healthiest children

<u>Destination Statement</u>: Improved Childhood Wellness <u>Strategic Goal</u>: Reduce Childhood Obesity

Perspective

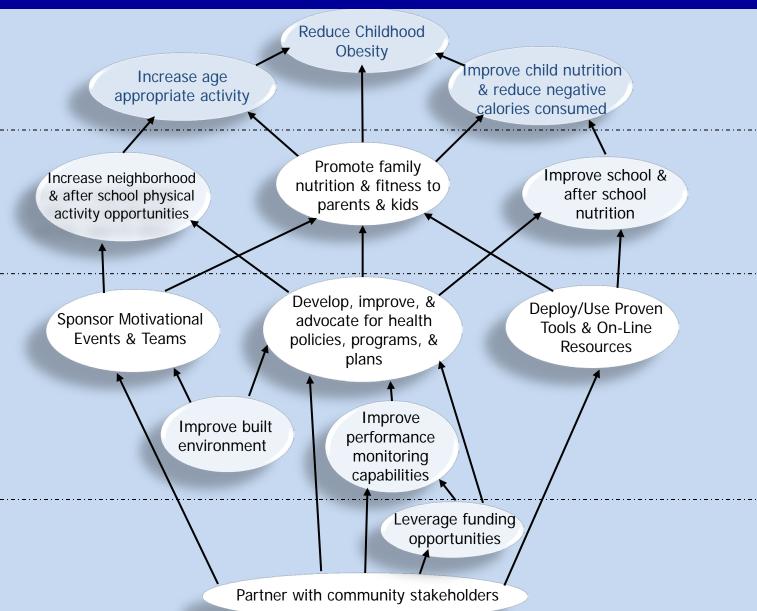
STRATEGIC OBJECTIVES

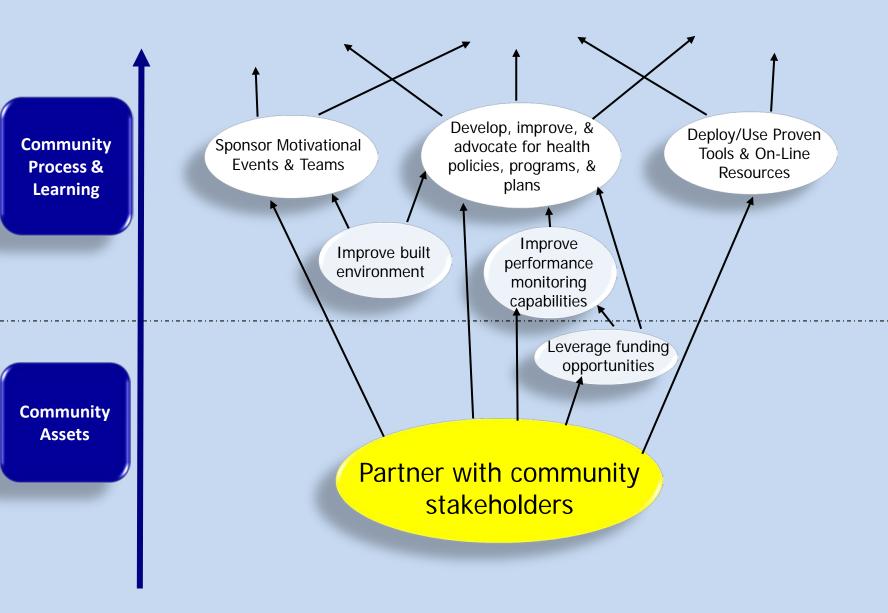
Community Health Status

Community Implementation

Community
Process &
Learning

Community Assets







You're in Good Company!

Premier Health Partners

Kettering Health Network

Children's Medical Center

WPAFB Hospital

WPAFB Command

WPAFB Family & Youth Services

ComputNet

Five Rivers MetroParks

YMCA of Greater Dayton

CareSource Foundation

Centerville Schools

Neighborhood School Centers (Dayton)

City of Dayton

Boonshoft Museum of Discovery

East End Community Services

Crayons to Classrooms

Unified Health Solutions (UHS)

The Dayton Urban League

Montgomery County Commission

Junior League of Dayton

United Way of Greater Dayton

Miami Valley Grown

Ready, Set, Soar

Diabetes Assoc of Dayton Area

American Heart Association

City of Kettering Recreation

Wellness Matters

Black Man's Think Tank

Children's Hunger Alliance

Ohio Action for Healthy Kids

Family and Children First Council

McGohan Brabender

Project Impact

Mini University

Shekinah Ranch

University of Dayton Fitz Center

Dayton Foundation

Wright State Center for Healthy Communities

Washington Twp Recreation Center

UD School of Physical Education

ThinkTV

Atomic Interactive

Dayton Dialogue on Race Relations

South Community Inc.

Huesman Heart Foundation

Miles that Matter

City of Kettering Recreation Services

WSU Boonshoft School of Medicine

Girls on the Run

Dayton Dragons

Inter-Ministerial Alliance

OSU Extension/4H

More every day

<u>Vision</u>: Healthier community, healthiest children

<u>Destination Statement</u>: Improved Childhood Wellness <u>Strategic Goal</u>: Reduce Childhood Obesity **Perspective STRATEGIC OBJECTIVES** Reduce Childhood Community Obesity Improve child nutrition Health Increase age & reduce negative **Status** appropriate activity calories consumed **Community** Promote family nutrition & Improve school & Increase neighborhood Implemenfitness to parents & kids after school & after school physical tation activity opportunities nutrition Deploy/Use Proven Develop, improve, & **Sponsor Motivational Tools & On-Line** advocate for health policies, **Events & Teams** Resources programs, & plans Community **Process &** Learning **Improve** Improve built performance environment monitoring capabilities Leverage funding opportunities Community

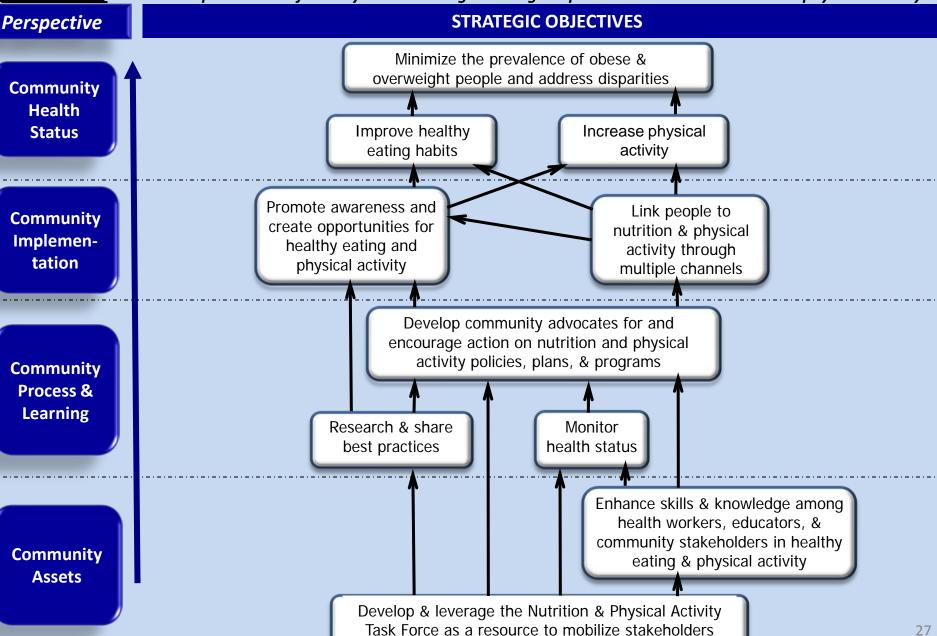
Partner with community stakeholders

26

Assets

<u>Vision</u>: All people in Bergen County will have access to information, resources, and programs to reduce the prevalence of obesity through improved nutrition and increased physical activity.

Strategic Goal: Reduce the prevalence of obesity and overweight through improved nutrition and increased physical activity.

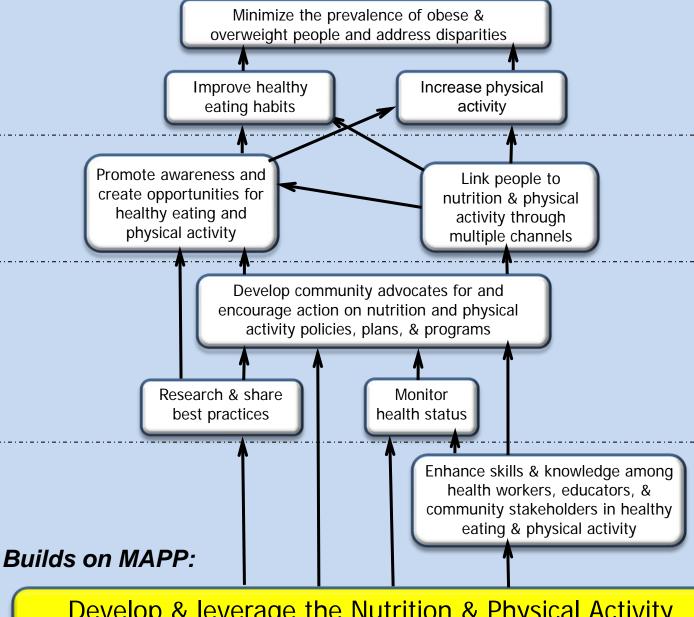


Community Health Status

Community Implementation

Community
Process &
Learning

Community Assets



Develop & leverage the Nutrition & Physical Activity
Task Force as a resource to mobilize stakeholders

Vision: Osceola County will be a community where all uninsured and underinsured residents have full access to the health care services that they need. (A systemic issue.)

Perspective

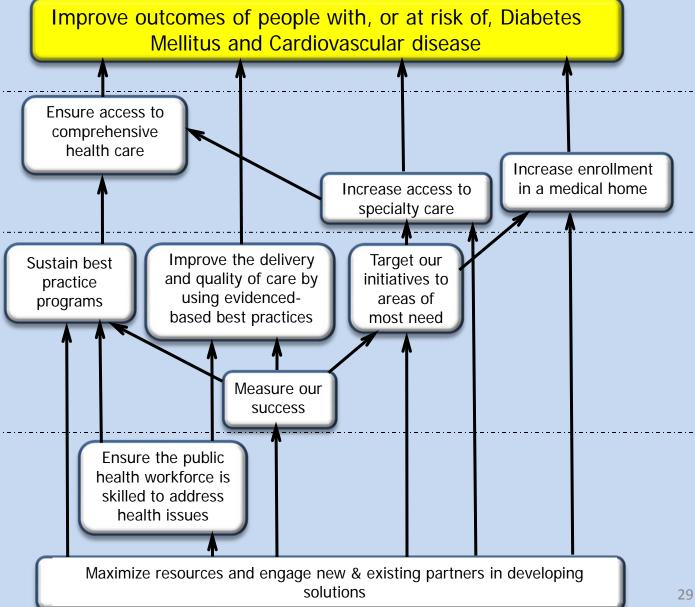
Community Health **Status**

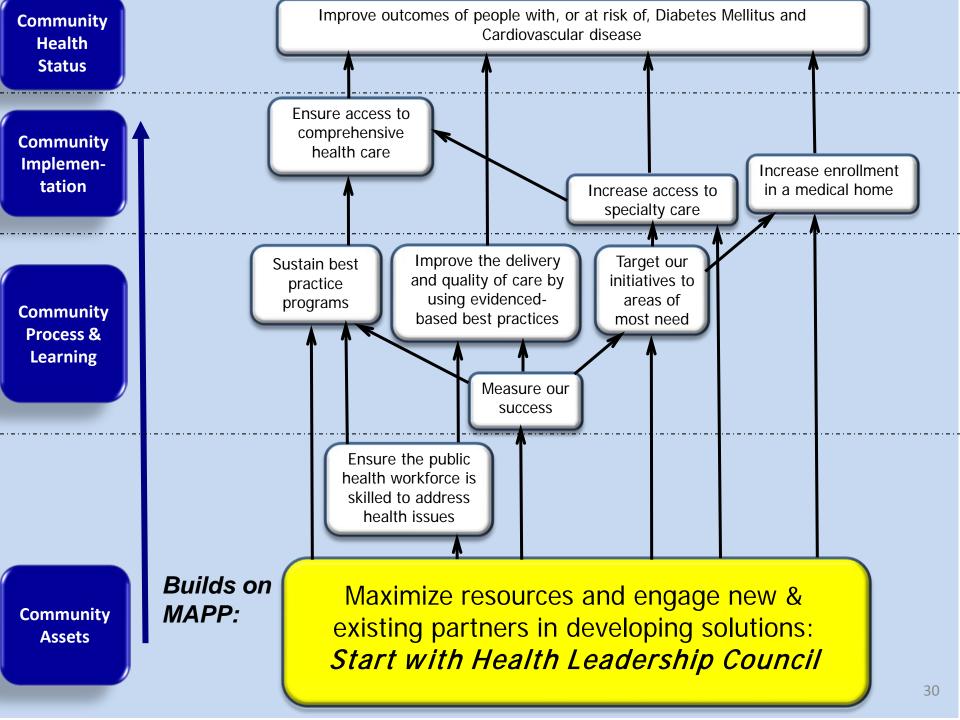
Community Implementation

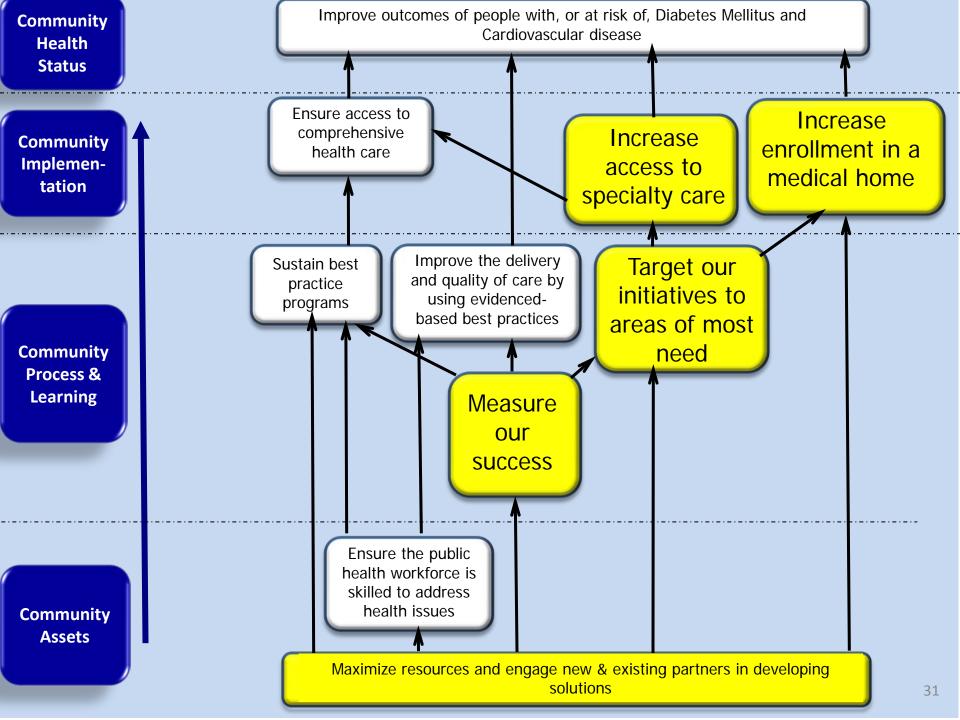
Community **Process &** Learning

Community **Assets**

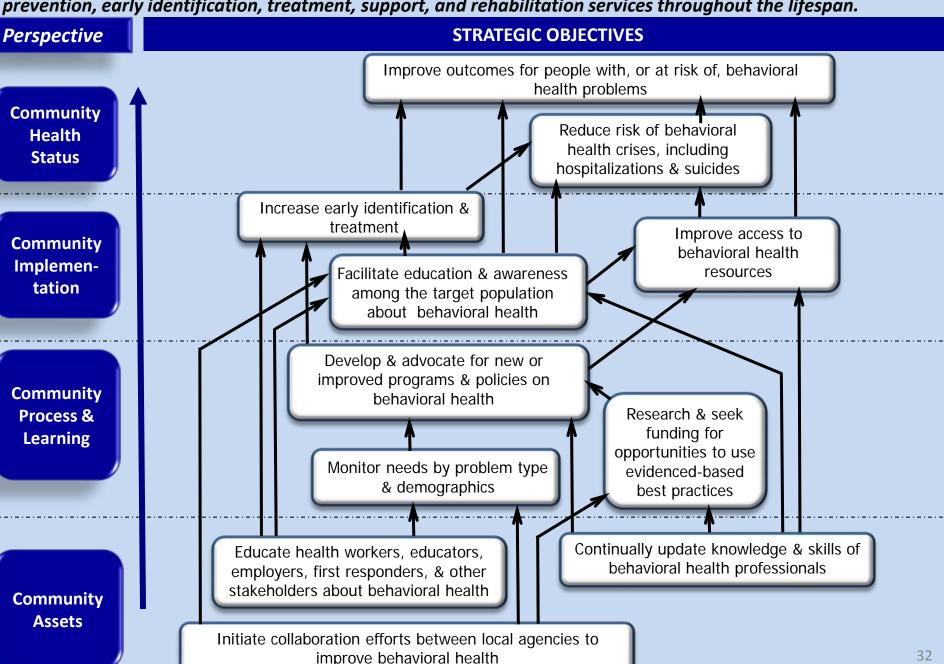
STRATEGIC OBJECTIVES



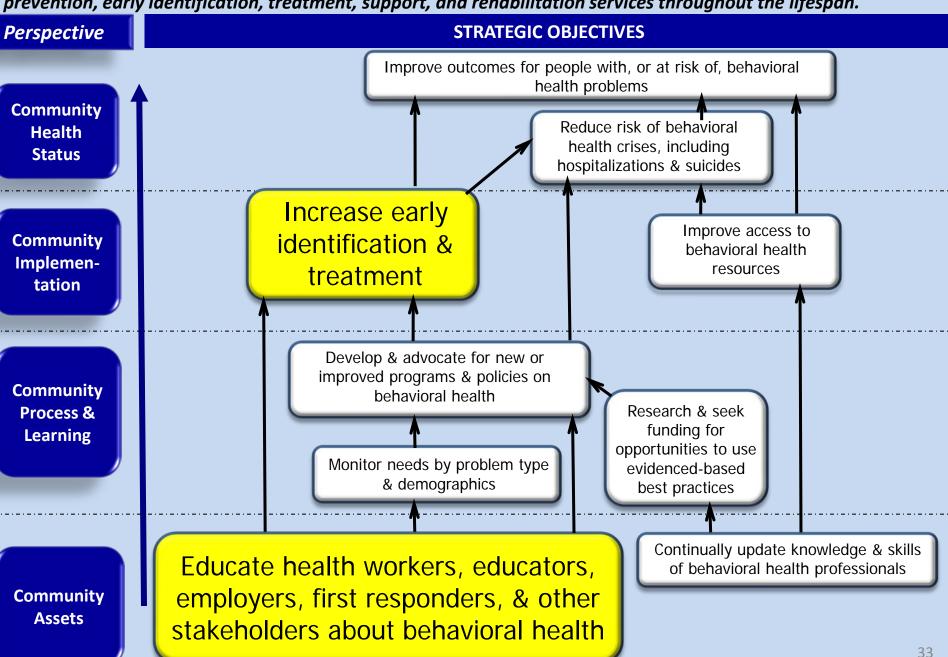




<u>Vision:</u> Establish a county-wide, holistic, culturally competent support system for behavioral health which provides prevention, early identification, treatment, support, and rehabilitation services throughout the lifespan.

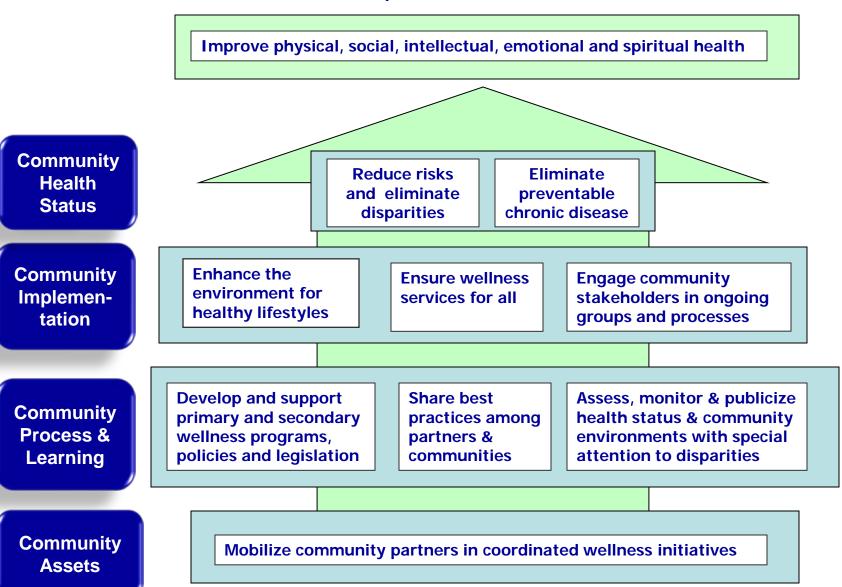


<u>Vision:</u> Establish a county-wide, holistic, culturally competent support system for behavioral health which provides prevention, early identification, treatment, support, and rehabilitation services throughout the lifespan.



Summit County Wellness Council Strategy Map

Vision: Summit County Residents at Their Peak of Wellness



"The process of working through the steps of the community scorecard has helped our Wellness Council fine-tune its purpose and structure. I strongly doubt we would have made the progress we have made if we had not used the community scorecard."

Anne Morse, Assistant Director of Nursing, Summit County Health District (Ohio)

"Working with the Results That Matter Team has been very beneficial in helping our community partners work together to develop a strategic plan that addresses access to services for the uninsured and underinsured. We have developed a strategy map to focus our resources toward achieving results that will make a significant difference in the health outcomes of our community." Belinda Johnson-Cornett, MS, RNC, MBA, Administrator, Osceola County Health Dept. (Florida)

Population Outcomes



Population & Participant Outcomes



Performance Drivers



e.g., inputs, capacity, outputs, efficiency, timeliness, quality ... anything measurable that *drives* outcome achievement.

Piney County Community Strategy Map to Reduce Childhood Obesity

Perspective

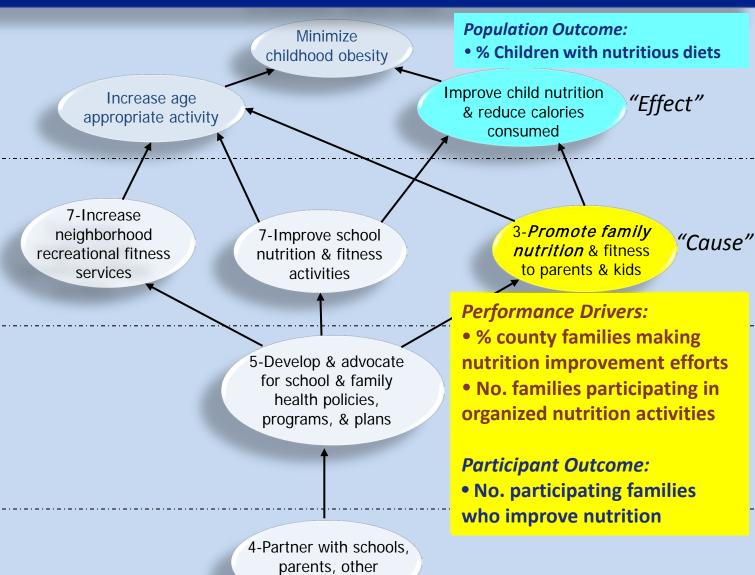
Community Health Status

Community Implementation

Community Process & Learning

Community Assets

STRATEGIC OBJECTIVES



stakeholders

Partner Contributions to Objective

Objective: Promote Family Nutrition & fitness to Parents & Kids

Initiative: Teach people how to cook healthy on an affordable budget

Partners: Elm City YMCA, Piney County School PTAs & Neighborhood Associations

Owner for this initiative(s): Sally Treeroot, Elm City YMCA

Desired Change (Increase Healthy Home Meals)

From:

- Individuals and families do not know how to cook healthy affordable meals.
- People think cooking healthy is expensive and time consuming.

To:

- People learn how to cook healthy affordable meals.
- People use their knowledge & skills regularly for themselves & their families.

Actions:

- Recruit parents, other meal preparers thru PTAs and Neighborhood Associations
- Plan and deliver weekly classes in 3-week programs throughout the year

Partner Performance Measures for Initiative	2009 Targets
No. families whose meal preparers complete at least one 3-week program	240
No. families with participants who use these skills at home	180

Partner Contributions to Objective

Objective: Promote Family Nutrition & fitness to Parents & Kids

Initiative: Develop Community Gardens

Partners: County Metroparks, After School Programs, Summer Camps

Owner for this initiative(s): **Jon Treeleaf, Piney County Metroparks**

Desired Change (Increase Resident-growing & Consumption of Fruits & Vegetables)

From:

- Children and families lack access and/or motivation to include fresh fruit & vegetables in their daily diet.
- After school and summer camp programs often offer unhealthy options.
- Many children and families are unaware of origins of fruit & vegetables and low cost of self-growing.

To:

- Children & families receive hands-on experience with garden growing which motivates trying fresh fruits and veggies & including more in their diets.
- After school & summer camp programs have a lower cost option for including daily fresh produce offerings & decreasing unhealthy snacks and beverages.

Actions:

Sweat equity by parents, kids, program staff for garden development & maintenance.

Performance Measures for Partner	2009 Targets
No. parents & kids providing sweat equity	600
No. community gardens established	30
No. participating kids in challenges self-tracking 5 fruit & veggies/day	300
% summer camps offering at least 3 fresh fruit & veggie servings/day	90%
% after school programs offering at least 1 fresh fruit or veggie/day	90%

Community Results Compacts



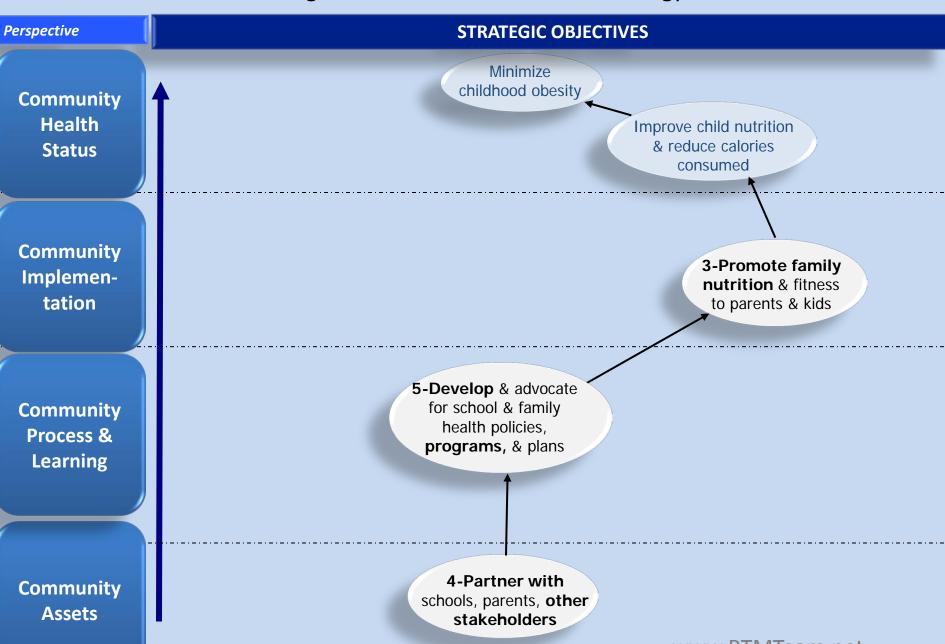
Partner-2-Partner

Mutual 'handshakes'

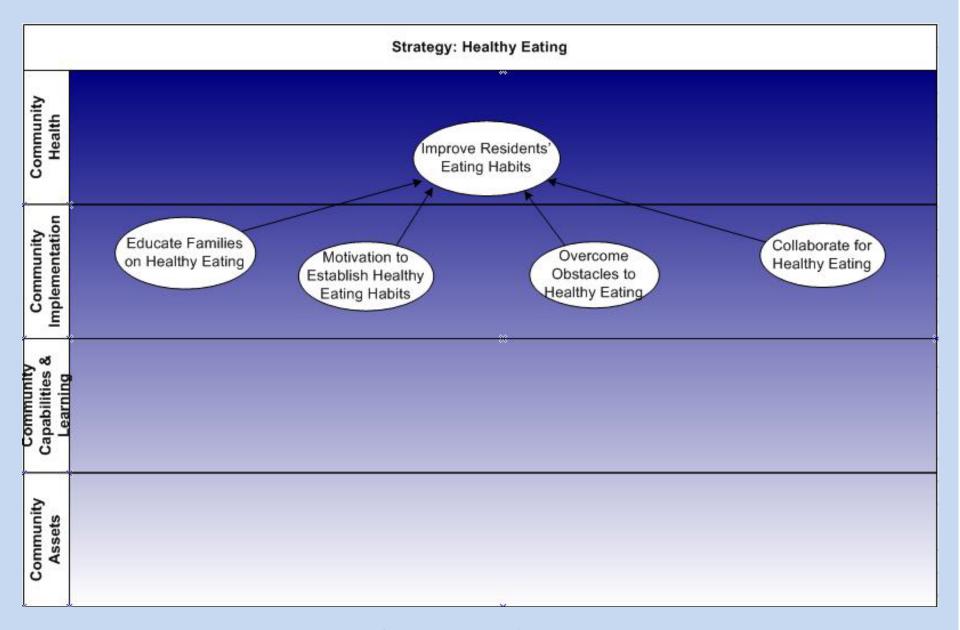
- Non legal, friendly document
- Defines what partner will do; what GetUp will do
- Helps to establish levels (types) of partnerships
- Helps partner determine measurability
- Goal is to have 70 to 100 signed 'handshakes' by early November

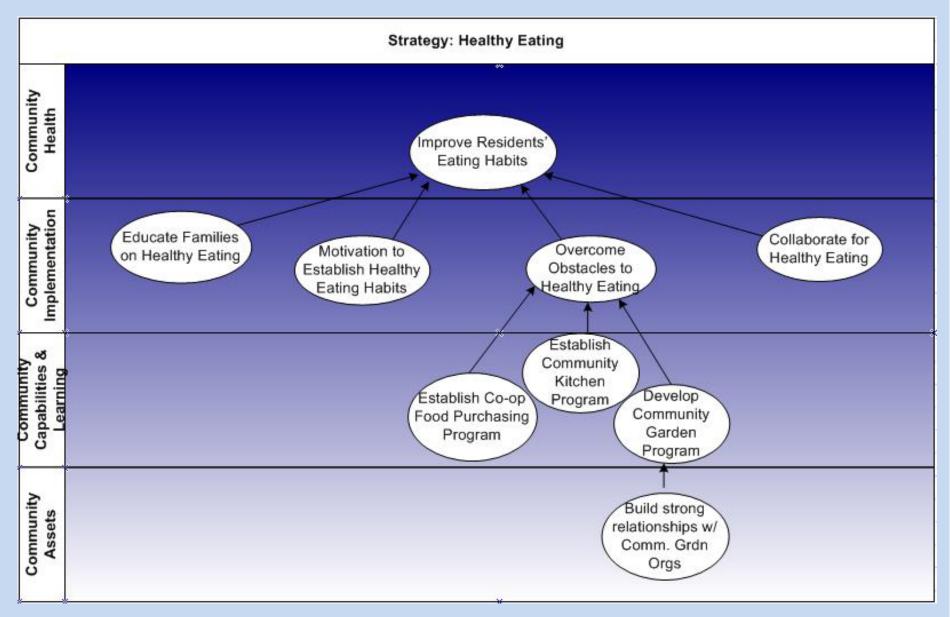


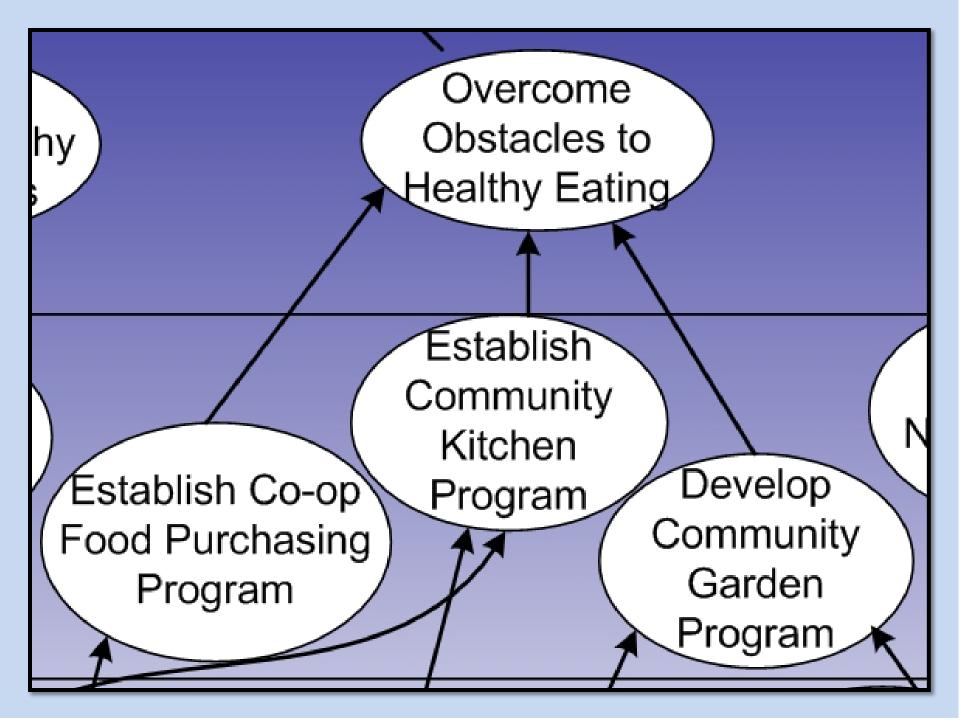
Drilling Down to The Next Level of Strategy Execution



How Communities of HOPE Supports the Theme of Minimizing Childhood Obesity







Wiki "InfoSheet" Contains Zoomable Details

★ OIS T-HL Establish Coop Food Purchasing Program

PAGE *

DISCUSSION

HISTORY

NOTIFY ME

EDIT

Return to Theme Page

Objective Name: Establish Co-op Food Purchasing Program

Description

One of the "flagship" programs of Communities of HOPE is the Co-op Food Pruchaseing Program that is being developed with Costco (and perhaps other food sources like Gleaners Community Food Bank). Detroit has serious "food deserts" where most it is difficult to purchase healthy food, and the cost of available food is high. Many residents lack transportation. Through the COH Co-op Food Purchasing program, residents will be able to order healthy food at affordable prices and have it delivered to the apartment complexes, without needing individual Costco memberships or the ability to get to a Costco store. An order form for healthy food and common household items will be used, and orders will be placed twice a month. Even though Costco doesn't directly accept Bridge Cards, the COH Purchasing Company will accept them, allowing people to buy greater quantities of healthy food than they typically buy at "Fringe Retailers."

Strategic Destination

From:

- Residents spend much of their food budgets at "Fringe Retailers" that sell unhealthy food for relatively high prices.
- · Residents can't afford Costco Memberships, use their Bridge Cards or get transportation to be able to access affordable, healthy foods
- Residents acting as individuals can't access affordable food purchasing through organizations like Gleaner's Community Food Bank
- . Poor health and nutrition is a root cause of many health, learning and social problems

To:

- Residents shift over \$100/month in purchasing from buying expensive junk food to healthy economical foo.
- . Co-op purchasing opens the opportunity to save money and enjoy better health
- · Residents learn to work together to gain immediate benefits for their lives and finances.
- · Better nutrition supports many other life improvements

Advisory Team



Search

New Page

Recent Changes

Manage Wiki

Home About COH

How to Use the Wiki Strategic Themes

SAM Next Steps

Partners

COH Programs

Recent Meetings Resource Library

CoH Team

edit navigation

Bottom of the Wiki-based InfoSheet

Advisory Team

- Cyndi Stempien (CoH/PPM)
- Bill Barberg (Insightformation)
- Bob Beale (PPM)
- Resident 1 (TBD)
- Resident 2 (TBD)

Possible Measures

- · Number of unique participants purchasing through the COH Co-op Food Purchasing program
- . Total dollars of food and products purchased through the Co-op Food Purchasing program

Active Initiatives

- . Refine list of COH Co-op Purchasing Items
- Refine COH Co-op Ordering and Distribution Plans
- Refine COH Co-op Purchasing Details with Costco

Possible Initiatives

- Explore leveraging Gleaners Community Food Bank Bulk Purchasing Plan
- Establish CoH Co-op Purchasing Jobs and Volunteer Roles

Status: Draft

Person Primarily Responsible for this InfoSheet: Cyndi Stempien



Part of the Theme Page in the Wiki

Theme Team

The Following are the primary people working on this theme.

- Member1
- Member2
- Member3

Objectives and Objective InfoSheets

The following Objectives make up this Sub-Theme...

Community Outcomes

Enhance the Quality of life
Reduce Health Problems & Chronic Disease
Improve Residents' Eating Habits
Reduce Health Disparties

Community Action

Educate Families on Healthy Eating

Motivation to Establish Healthy Eating Habits

Overcome Obstacles to Healthy Eating

Collaborate for Healthy Eating

Community Capabilities and Learning

Offer On-site Training through Partner Organizations
Deploy/Use Proven Tools and On-Line Resources
Create Motivational Events & Teams
Establish Co-op Food Purchansing Program
Establish Community Kitchen Program
Develop Community Garden Program

About COH

Home

How to Use the Wiki

Strategic Themes

SAM Next Steps

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COH Programs

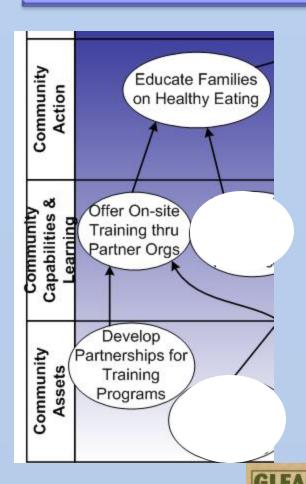
Recent Meetings Resource Library

CoH Team

edit navigation



Teaming with Gleaners Community Food Bank

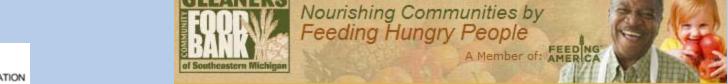


Residents Love the Classes – plans to expand offering.
Starting to build relationships and vision.

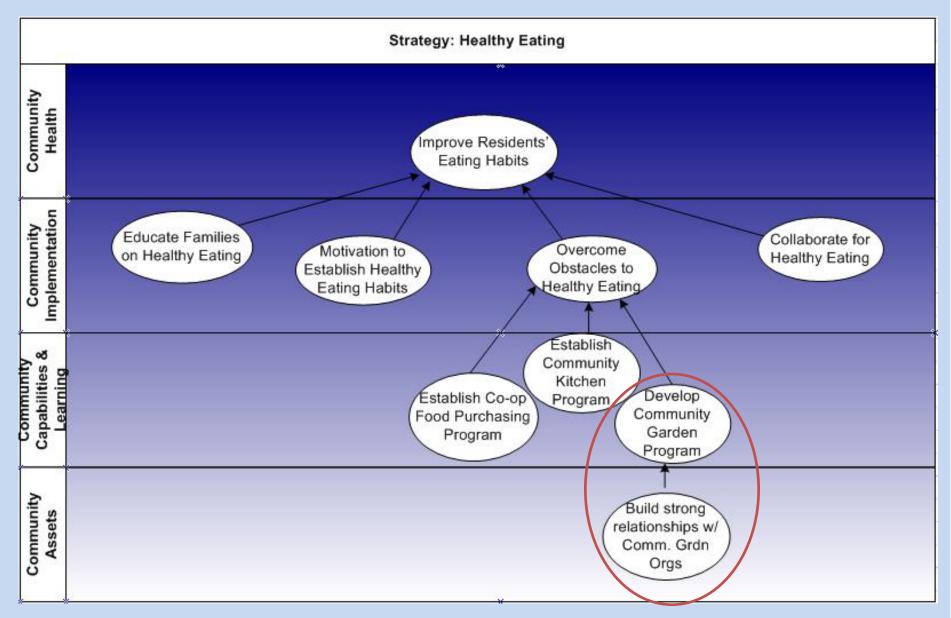
Began offering Operation Front Line's on-site Cooking and "Eating Right" classes.

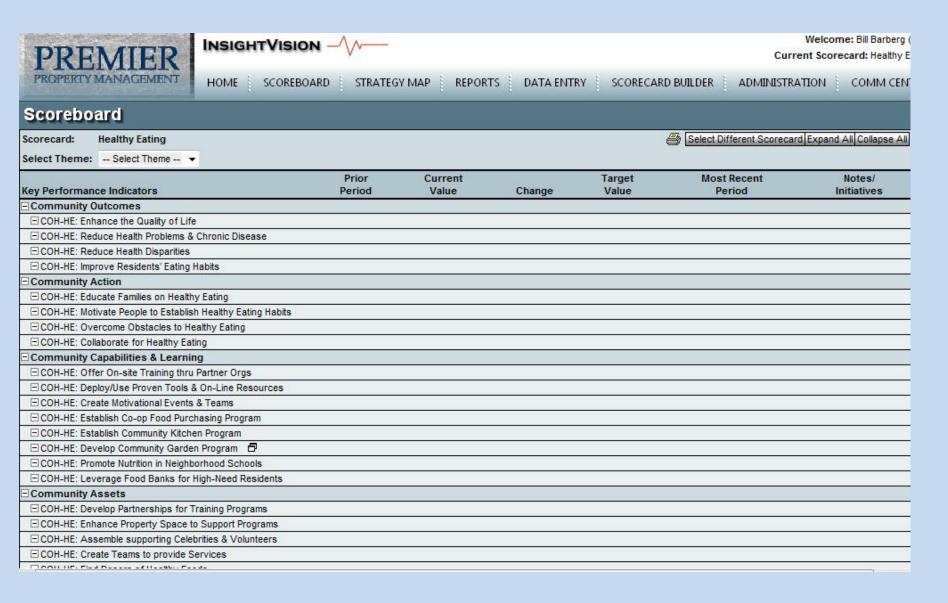


Built relationship with Gleaners Community Food Bank, which offers the Operation Front Line Training Program.







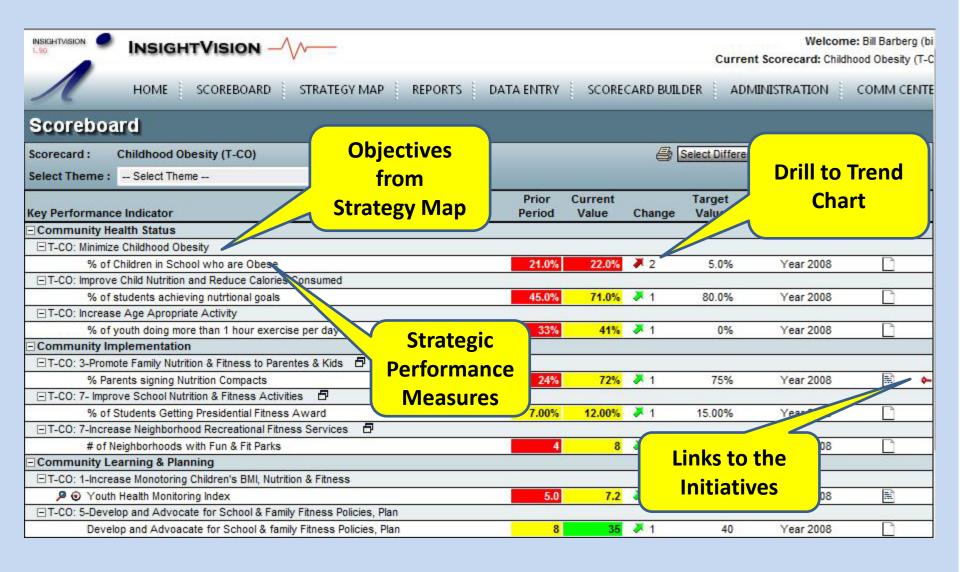


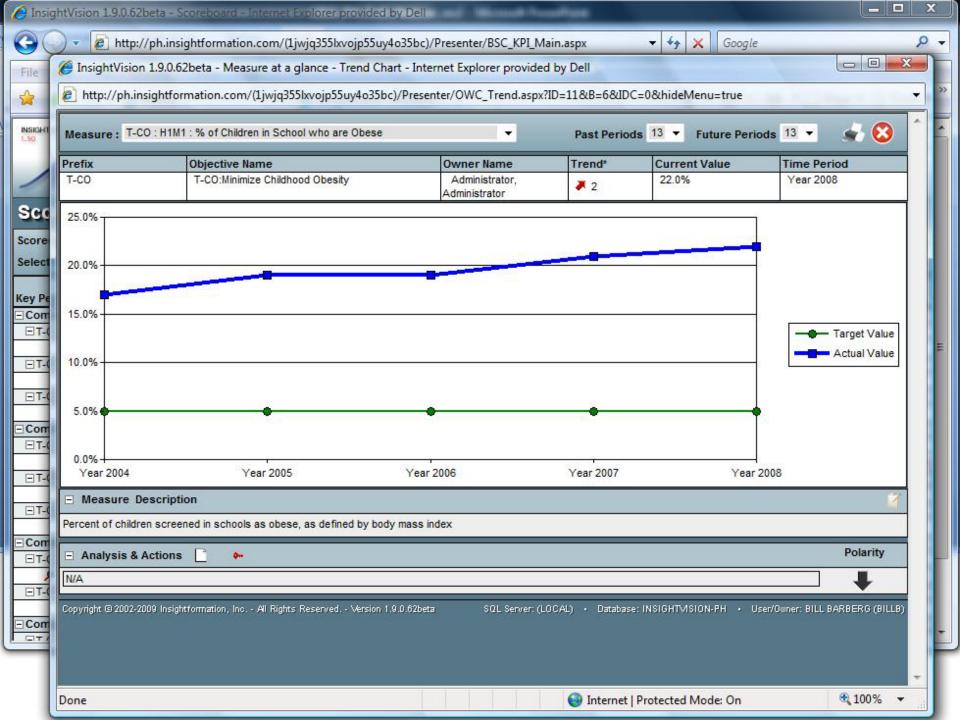
☐ Community Capabilities & Learning
☐ COH-HE: Offer On-site Training thru Partner Orgs
☐ COH-HE: Deploy/Use Proven Tools & On-Line Resources
☐ COH-HE: Create Motivational Events & Teams
☐ COH-HE: Establish Co-op Food Purchasing Program
☐ COH-HE: Establish Community Kitchen Program
☐ COH-HE: Develop Community Garden Program ☐
COH-HE: Promote Nutrition in Neighborhood School
COH-HE: Leverage Food Banks for High-Need Residents
Drill-down to Causal

Drivers

Objective: COH-HE: Develop Community Garden Program
Drill Path: Develop Community Garden Program
Key Performance Indicators
Gleaner's Community Food Bank
☐ Pt-GCFB: Training on Cooking with Vegetables
of People completing cooking classes
Motor City Blight Busters
☐ Pt-MCBB: Convert Blighted Lots to Community Gardens
of hours volunteered to build community gardens
☐ Greening of Detroit
☐ Pt-GD: Share Communitity Garden Practices & Resources
□ PPM Theme: Four-Star Living (T-4S)
T-4S: Leverage Community Assets (space)
of on-site / near-site vegetable gardens
■ PPM Theme: Four-Star Living (T-4S) ■ PPM Theme: Four-Star Living (T-4S)
☐T-4S: Engage Residents in Organizing Activities
of Unique Residents Participating in Garden Program
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Adding Measures and Initiatives to Create the Balanced Scorecard





Opportunity to Learn More

- Detailed Webinar on the Communities of HOPE case study (Recording)
- Webinar on how InsightVision and Wikis supports community-wide strategy execution
 - November 3, 2009 10:00 AM Central Time
- Respond on Survey if Interested in either of these

Next Steps & Available Resources

- Read chapters in The Public Health Quality
 Improvement Handbook (PHF-ASQ, April 2009)
- Results That Matter Team & PHF offer training and consulting on strategic planning using strategy mapping
- Become part of an economical group consulting program with other Local Health Departments
- Become part of a state-organized group consulting program with other Local Health Departments

Group Consulting

Multiple Stages with Different Levels of Effort Stage 1 Goal: Build & Start Using a Strategy Map

- Work with your core partners to develop a high-level strategy map for a targeted public health issue
- Develop initial commitments to implement the strategy
- Gain experience with collaborative tools like the Wiki and Web-conferencing
- Build momentum for subsequent stages
- Time to get additional funding

Structure of Group Consulting

- Similar to the successful projects we're now completing
- 6 community public health organizations selected to develop strategy maps for one issue each, with their key community partners
 - A series of web-based workshops and remote consulting assistance
 - Web forum provided to share learnings
 - Initial use of Wiki technology

Stage 1 Options

- We could create clusters from multiple states based on similar topics for better sharing of ideas
- State-based Cohorts
 - May meet for one or more in-person consulting sessions
 - Tailor engagement to align with state programs, data collecting, etc.
 - Save on software costs in subsequent stages
- Different levels of Technology
- Cost: Approximately \$9,500 per Community

Value of Stage 1 Engagement

- Agreement among initial partners on a clear path to achieve priority health outcomes
- A communication tool to recruit more partners and enable them find their strategic roles
- Selected partner commitments and measures developed to support implementation
- People skills developed to create and refine strategy content

Moving on to Stage 2

- A variety of levels of engagement
- Different options for leveraging technology
 - Wiki
 - InsightVision
 - Integration with other reporting tools
- Options for remote versus on-site consulting
- Group consulting or community-specific
- Different levels of investment

Teaming for ARRA Grants

Even if you're not ready for Stage 1, we can:

- Have a web-conference with you on how we can support your ARRA grant application for "Communities Putting Prevention to Work" or other grants.
- Team with you to help strengthen your proposal by including CBSC, Strategy Maps, and the use of technologies.

Contacts to Go Further

- To become part of a new CBSC group project, to organize one in your state, or to get more info: Contact Paul Epstein
 - At <u>paul@RTMteam.net</u> or (212) 349-1719
- For teaming on an ARRA grant, Connecting CBSC with MAPP, or other consulting or training:
 Contact Paul Epstein
- To learn more about InsightVision or Wikis: Contact Bill Barberg
 - At bill.barberg@insightformation.com or (763)521-4599 x13

Questions?