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Strategic Management

Beth Bozzelli, MBA, RN, CNOR, CSSM



Objectives

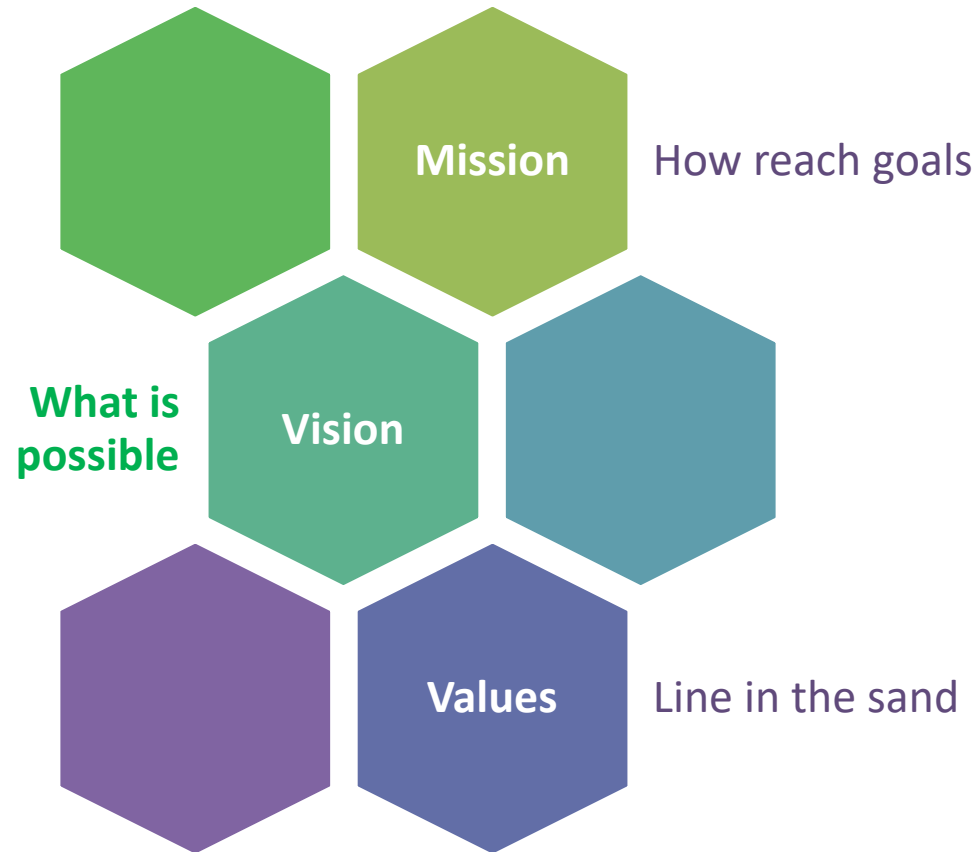
- Discuss The Key Elements of a Strategic Plan
- Review Tools Used to Identify Opportunities
- Describe the Importance of Succession Planning



Strategic Plans

A management plan that helps drive the organizational agenda, strategy, mission, vision, and values.







- Existing Needs
- What We Stand For
- Commitment to Mission

Mission



- Inspiring
- Reflects Possibilities
- Desired Outcome

Vision



- Reflection of Character
- Lived Daily
- Can't Dictate Values

Values



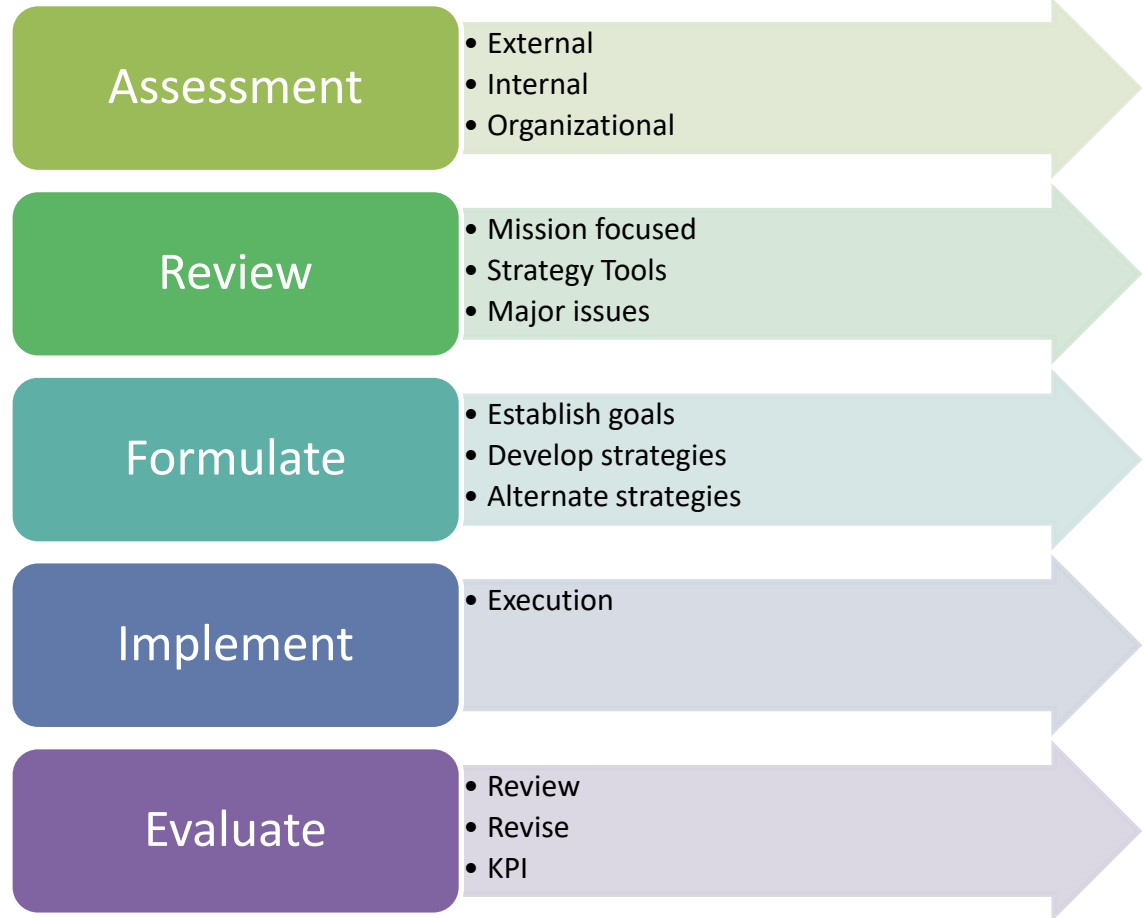
Strategic Plans

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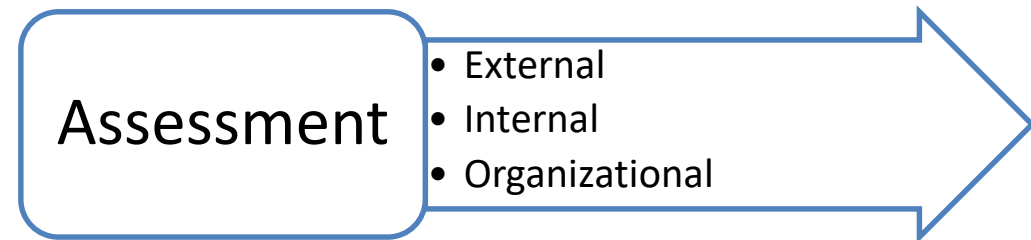
Elements of Strategic Plans





Assessment

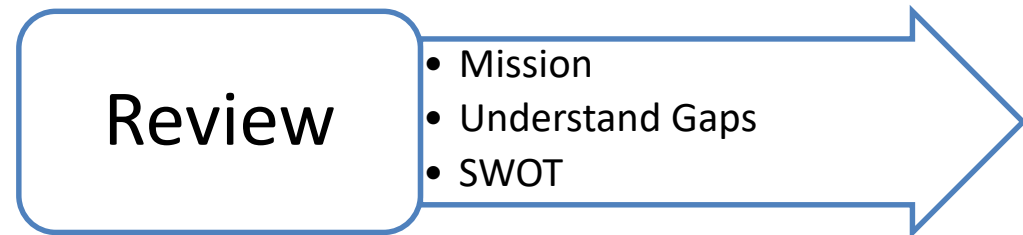
- Process Improvement Programs
 - Tools
- Market Analysis
- Capital Requirements





Review

- Identify Gaps
- Tie Back to Mission/Value
- Multidisciplinary





Formulate

- Strategies
 - Short Term
 - Long Term
- Collaborative Effort
- Operational / Action Plans

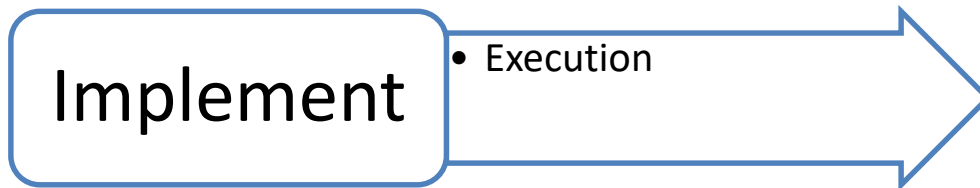
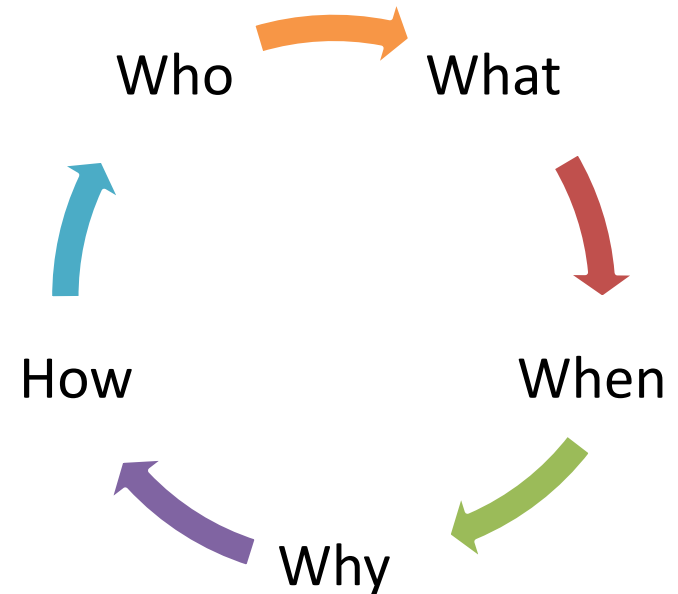
Formulate

- Major issues
- Establish goals
- Develop strategies



Implement

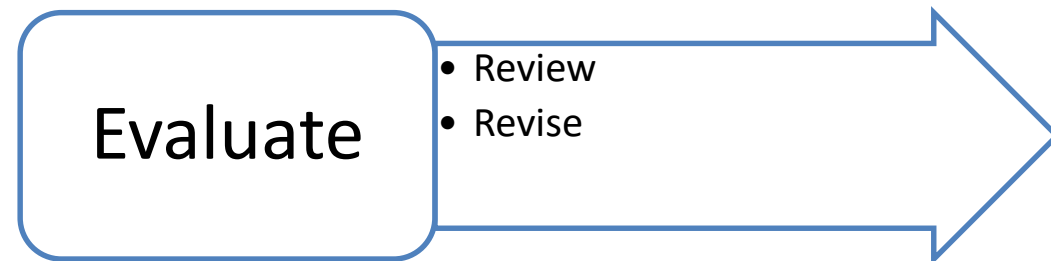
- Communicate
- Set Expectations





Evaluate

- Continual Process
- Revise as needed
- Communicate Findings
- Flexible





Porters Five Competitive Forces





SWOT Analysis

Facilitation tool
used in strategic
planning





Strength

- Internal Focus
- Strong Operational Characteristics
 - Staffing
 - Technology
 - Referring Physicians
 - Center of Excellence





Weakness

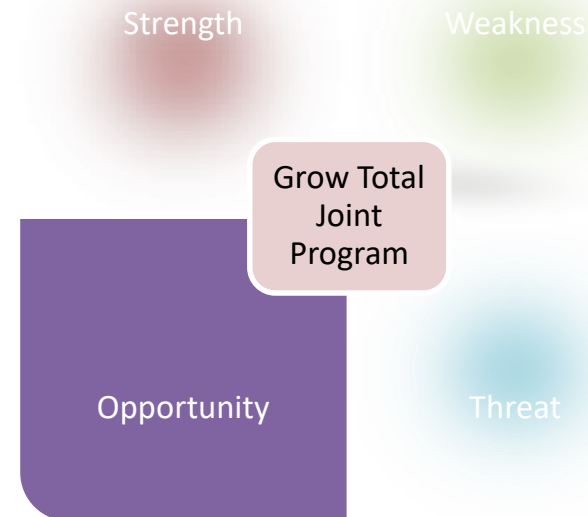
- Internal Focus
- Areas That Can Be Improved
- Factors That Can Increase Cost, Decrease Satisfaction, Drive Business Elsewhere
 - Poor implementation of health record
 - Staffing issues





Opportunity

- External Focus
- What Exists and How Can We Benefit
 - Competitor Shut Down





Threats

- External Focus
 - What is in the way?
 - What are others offering?

Strength

Weakness

Grow Total
Joint Program

Opportunity

Threat



Gap Analysis

- Tool used to identify opportunity to improve process.
- Comparison against current practice with identified best practice
- Use to define / plan future state



Gap Analysis Worksheet

FIGURE 2.2

GAP ANALYSIS EXAMPLE WORKSHEET¹

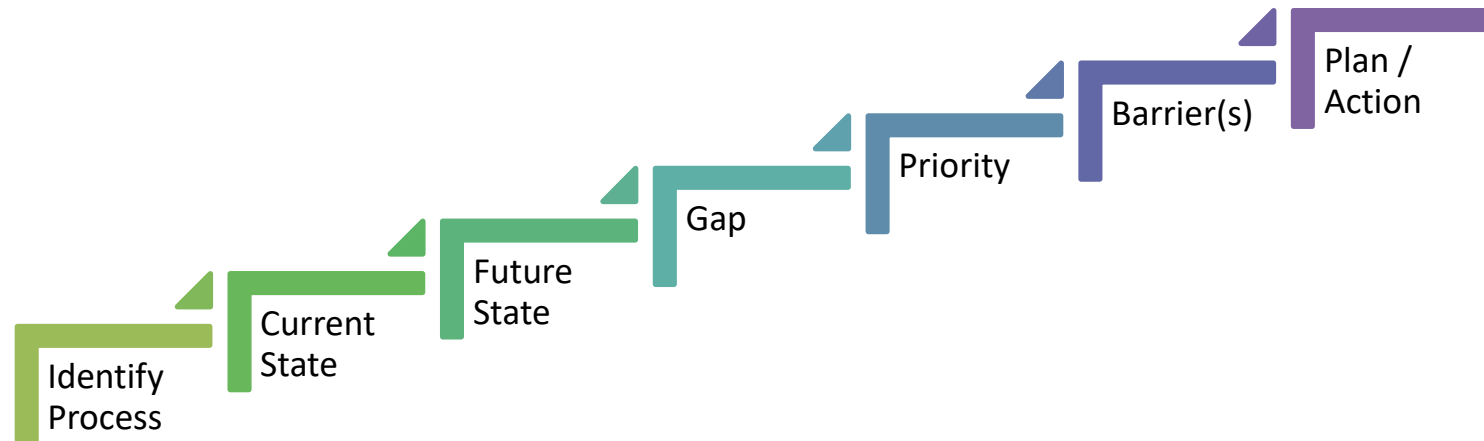
Current Practice	How Current Practice Differs from Best Practice	Barriers to Implementing Best Practice	Strategies to Overcome Barriers	Plan to Implement or Reason for Inability to Implement Best Practice
Not covering prepared sterile tables when surgery is delayed	Covering sterile tables when surgery will be delayed	Staff resistance	Staff education	Staff in-service education and policy and procedure review
Patient check-in at clinic	Patient check-in at preoperative department	Provider resistance	Demonstrate efficiencies	Provider education, efficiency tracking, on-time/cancellation metrics

Reference

1. Instructions: GAP analysis. Agency for Healthcare Research and Quality. 2014. <http://www.ahrq.gov/professionals/systems/hospital/qitoolkit/d5-gapanalysis.pdf>.



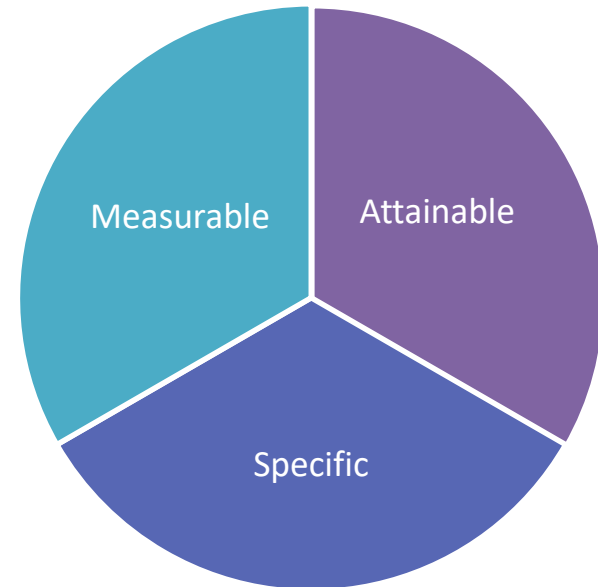
Gap Analysis Key Steps





Action Plan

Detailed plan outlining actions, owner, dates, status, and risks.





Action Plan Benefits

- Defined Plan
- Identifies Resources
- Accountability
- Identifies Roadblocks
- Sense of Accomplishment



Be Thoughtful When Creating Action Plans

- Prioritize
 - Competing Priorities
 - Resources
- Realistic
- Supporting Documentation
- Tie to Gap Analysis



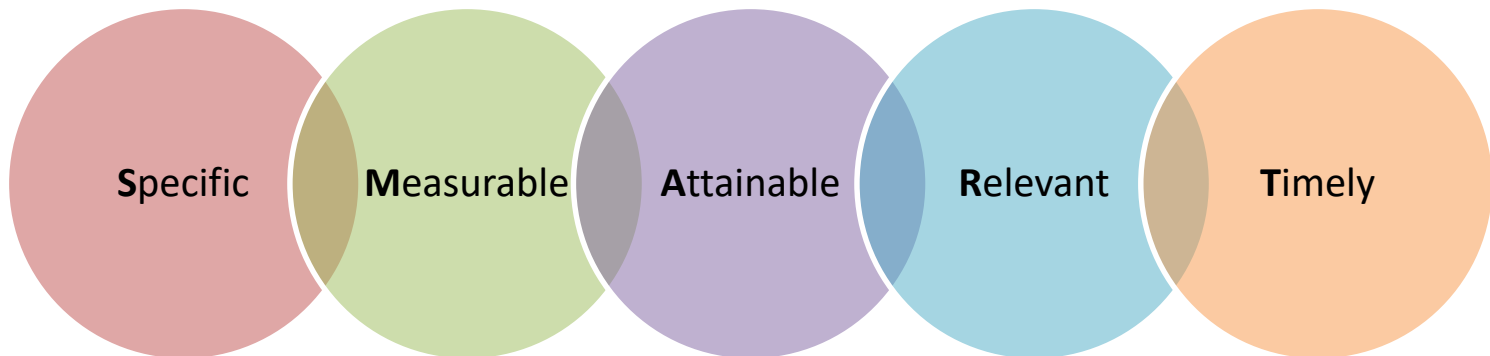


Action Plan Template

GAP ANALYSIS				ACTION PLAN			
PROCESS REVIEWED	CURRENT STATE <small>(Current facility process or observed standard)</small>	FUTURE STATE <small>(Desired state, performance standard, etc.)</small>	IDENTIFIED GAP / OPPORTUNITY	ACTION STEPS TO BE TAKEN	RESPONSIBLE OWNER(S)	DUE DATE	Comments
Sterility - Instrumentation Transport	<ul style="list-style-type: none"> •Staff check integrity of packages and wraps • Not every indicator in multi-level pans was validated • Instruments covered upon transportation to SPD • No biohazard sticker placed on cover prior to instrument transportation 	<ul style="list-style-type: none"> •All indicators are checked •In multi-level pans, the indicator at the point of greatest challenge is the most crucial indicator •Enzymatic cleaner on instruments prior to transportation •Biohazard stickers placed on instrumentation prior to transportation to SPD 	<p>Potential for non-sterile instruments to be placed on the back table.</p> <p>Failure to meet requirements of biohazard sticker placement</p>	<ul style="list-style-type: none"> •Ensure all indicators are checked. For multi-level pans the indicator at the point of greatest challenge is the checked. •Enzymatic cleaner used on dirty instruments. •Biohazard stickers placed on wrap prior to transport to SPD. 	Sterile Processing Manager	11/1/2020	<ul style="list-style-type: none"> • Biohazard stickers ordered 9/21/20 • Inservice scheduled 9/15/20
Case Picking	<ul style="list-style-type: none"> •Cases are picked as time permits. •No process in place for order of case picking. •Not all first case of the day cases are picked •Observed teams pick cases by memory. Preference card not reviewed during picking 	<ul style="list-style-type: none"> •Cases are completely picked prior to time of surgery •All first cases of the day are picked •Preference cards are used to pick cases. 	<p>Case cancellations and delays attributed to missing supplies due to cases not being picked. When preference cards are not used for case picking opportunity to miss supplies.</p>	<ul style="list-style-type: none"> •Develop plan and process to ensure all cases are picked prior to time of surgery. • Develop process to ensure all add on cases and cancellations are communicated to supply chain OR staff •Implement audit tool to validate 	Central Core Manager	11/1/2020	



SMART Goal Setting



Develop SMART goals when creating action plans to facilitate communication and appropriately track progress



Specific

- Simple
- Specific
- Clear



Specific



Measurable

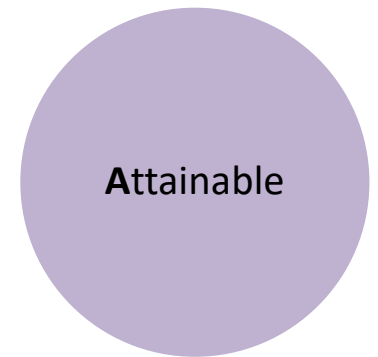
- Ability To Track
- Ability To Quantify
- X by Y
- Clearly Defined KPIs

Measurable



Attainable

- Realistic
- Achievable





Relevant

- Pertinent To Your Business
- Does It Meet Need

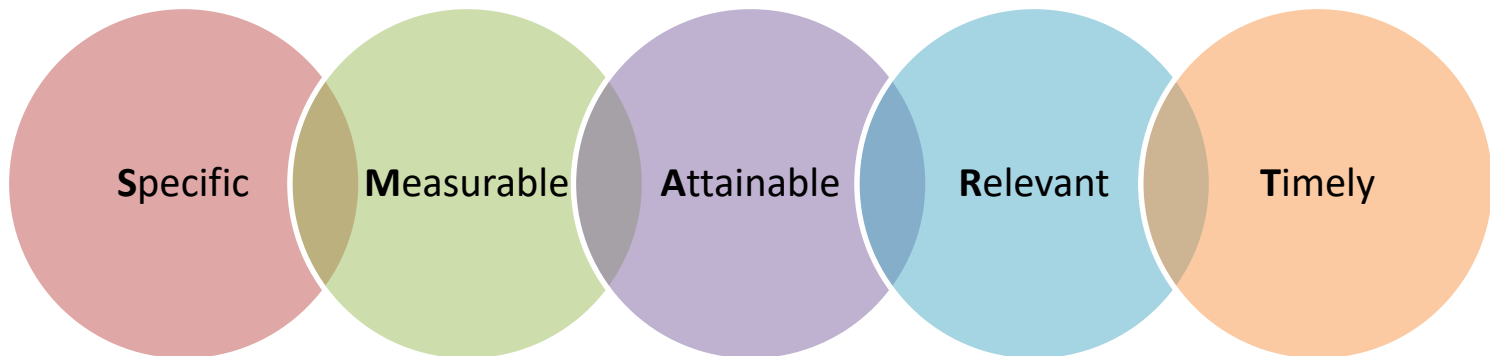


Timely

- Provides Deadlines
- Provide Accountability



SMART Goal Setting



Develop SMART goals when creating action plans to facilitate communication and appropriately track progress



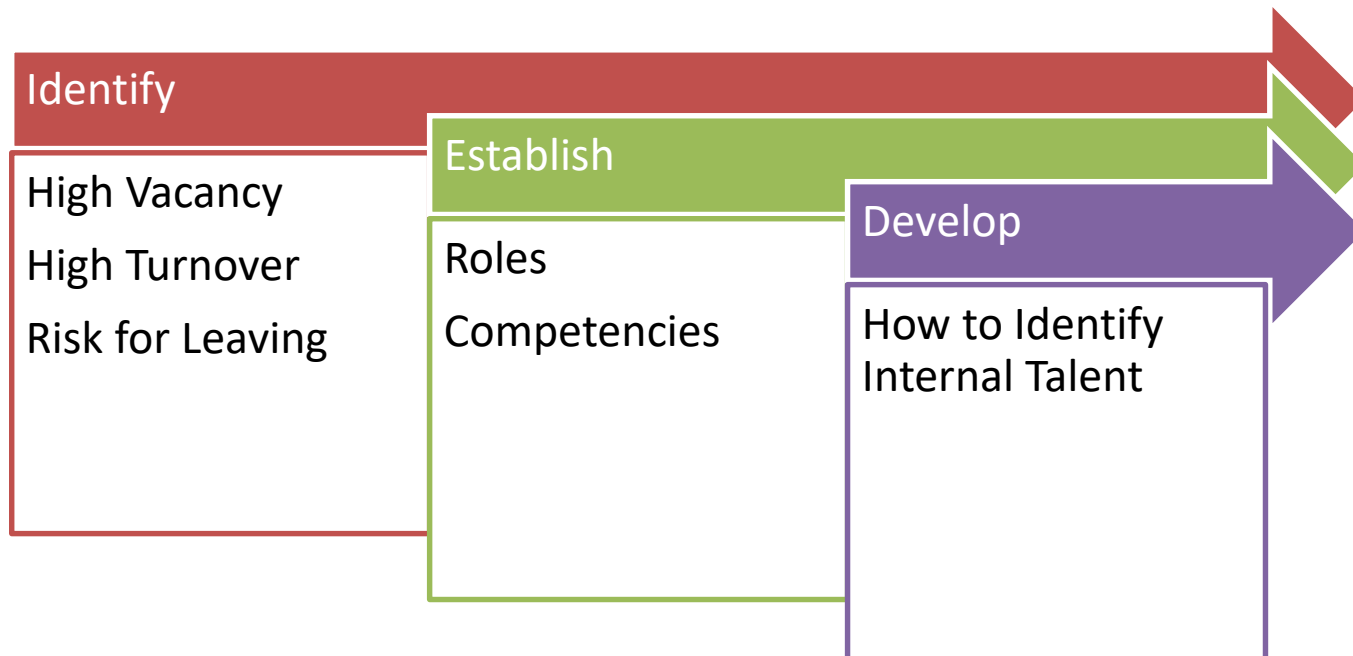
Succession Planning

- Proactive Plan to Prepare
 - Population Ready to Retire
 - Intellectual Property
- Plan Ahead
 - Begin Early
 - Know Talent
 - Know Interest





Succession Planning

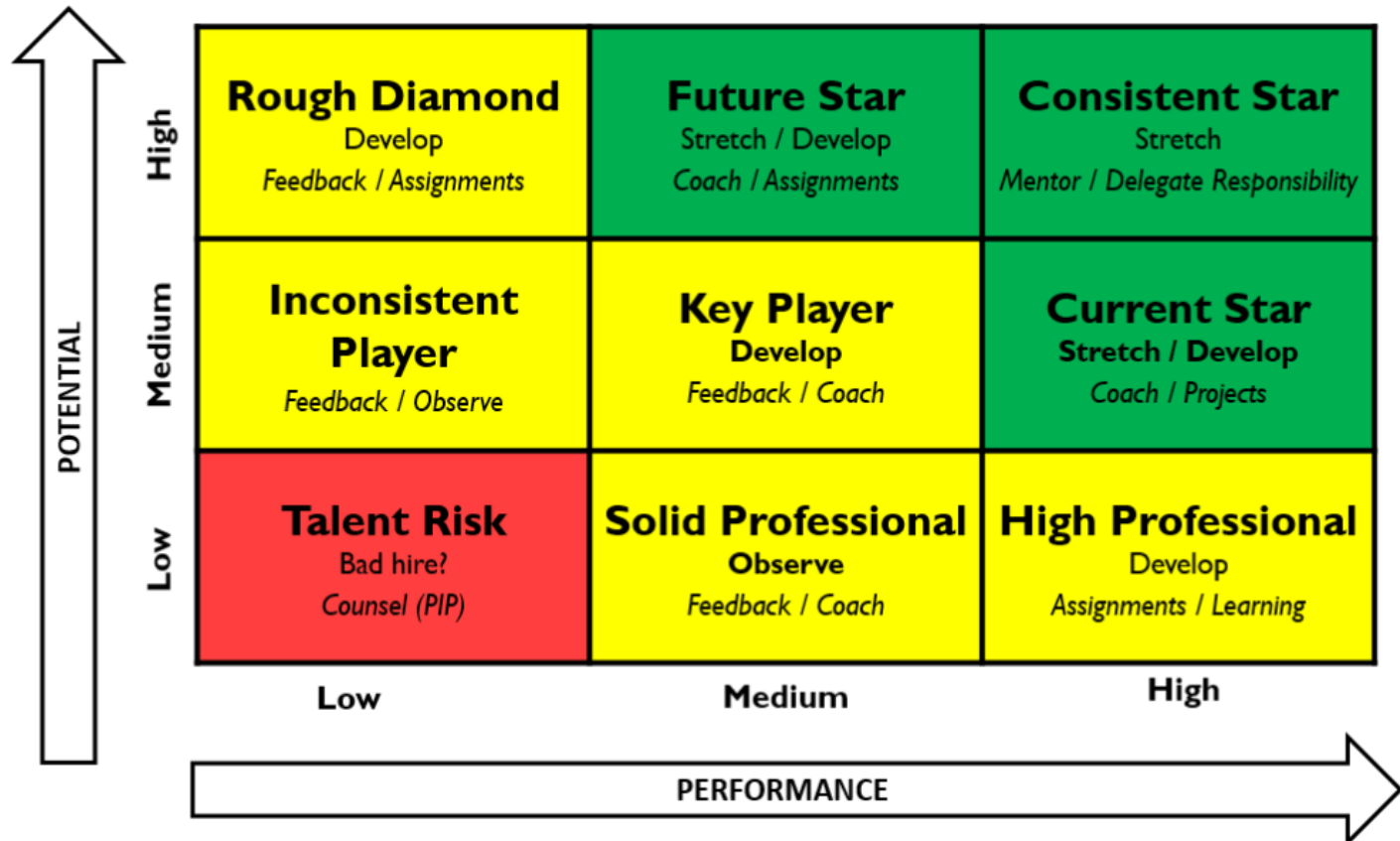


According to American Nurse Association – Three Critical Steps in Succession Planning:



Succession Plan Tools

9 Box





Succession Plan Tools

Readiness Template

Position	Current Incumbent	Expected Opening	Ready Now	1-2 Years	3-5 Years
OR Manager	Beth Bozzelli	December 31 2020 (Retirement)	Jane Doe John Smith		Amy Law Jane Craig
SS Director	Dawn Whiteside	2 Years		Sally Smith Jody Jones	Betty Adams Kim Lee



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