

**THE *BALANCED SCORECARD*:  
A QUALITY ASSURANCE  
SYSTEM FOR COLLEGE HEALTH**

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# OVERVIEW/OBJECTIVES

- Evidence-Based Management
- Strategic Planning
- Quality Assurance
- Balanced Scorecard
  - Vision and Mission
  - Objectives and Measures
  - Perspectives
  - Learning Outcomes and Metrics
- Build a Balanced Scorecard

# EVIDENCED-BASED MANAGEMENT

## Health Care Journals

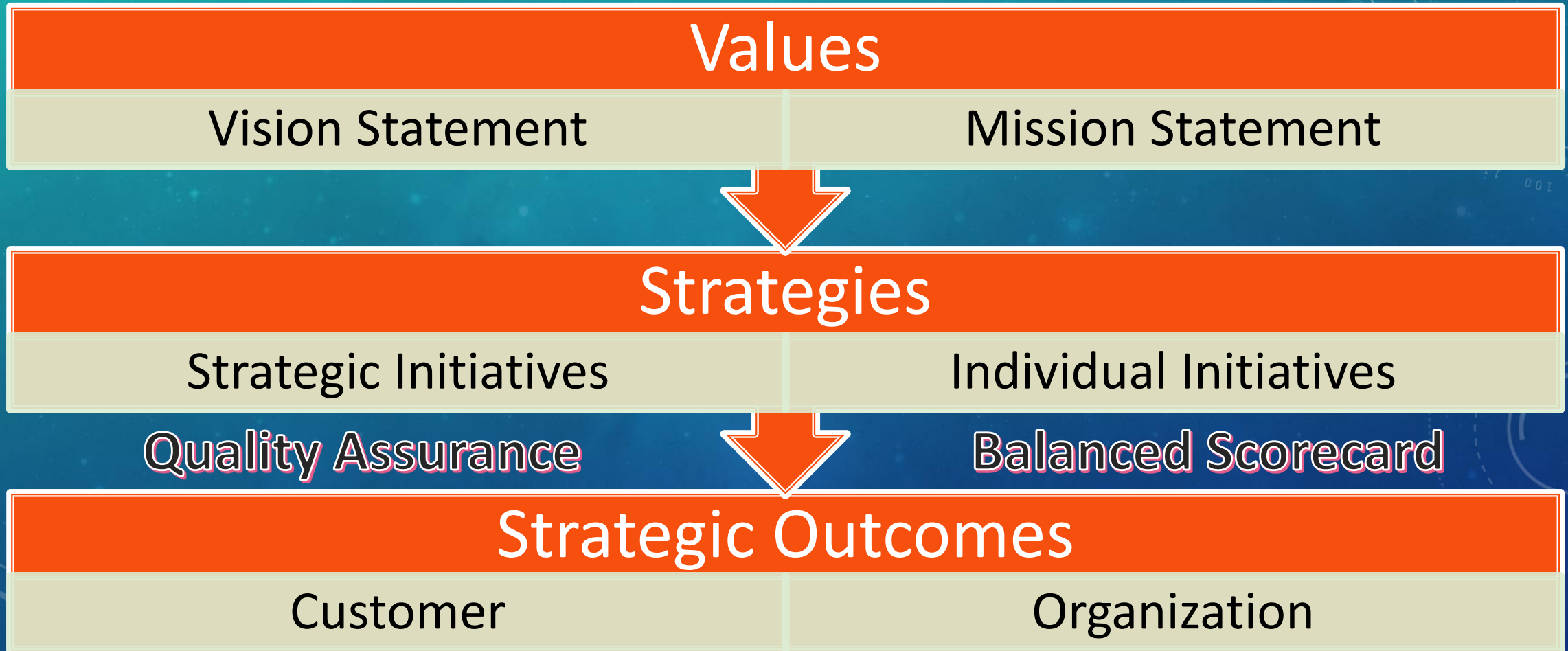
- Journal of the American Medical Association
- New England Journal of Medicine
- Journal of American College Health
- Journal of Primary Care
- Journal of Adolescent Health
- Journal of College Student Psychotherapy
- Journal of Clinical Psychiatry
- American Journal of Health Behavior
- Journal of Infectious Diseases
- Annals of Family Medicine

## Health Management Journals

- Journal of Health Care Management
- Journal for Healthcare Quality
- Journal of Health Services Research and Policy
- Journal of Healthcare Resource Management
- Evaluation & the Health Professions
- Health Care Management Review
- Health Care Strategic Management
- Health Policy Health Policy & Planning
- Healthcare Financial Management

# STRATEGIC PLANNING

*Strategy is one piece of a continuum...*





# QUALITY ASSURANCE

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**“I have a delivery for you: 1000 pens with the slogan ‘Excellence is in the Details’ and 500 factory-second, slightly irregular coffee mugs that say ‘Quality Matters’.”**

# QUALITY ASSURANCE



# QUALITY MANAGEMENT & IMPROVEMENT

## AAAHC



# BALANCED SCORECARD HISTORY

Measurement and  
Reporting

1992

Alignment and  
Communication

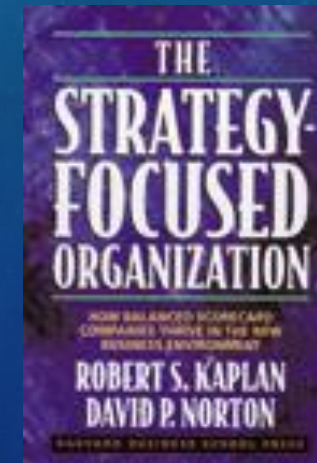
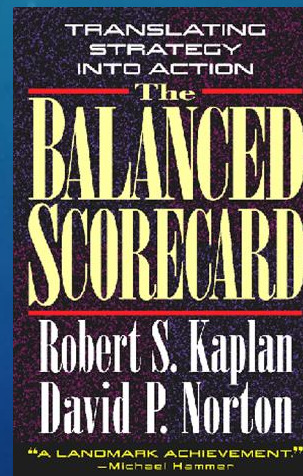
1996

Enterprise-wide  
Strategic  
Management

2000

## **Articles in Harvard Business Review:**

- “The Balanced Scorecard — Measures that Drive Performance” January -February 1992
- “Putting the Balanced Scorecard to Work” September -October 1993
- “Using the Balanced Scorecard as a Strategic Management System” January - February 1996





# WHAT IS THE BALANCED SCORECARD?

## *Strategic Management System*

- Directive: Guide the implementation of the vision by translating strategy into objectives and actions.
- Instructive: Provides feedback on outcomes that can be used to modify objectives and actions.
- Systemic: Focus on four (or more) key perspectives

# IS ALL ABOUT BALANCE



Financial measures  
Long term goals  
Internal factors  
Leading indicators



Non-financial  
Short term goals  
External factors  
Lagging indicators

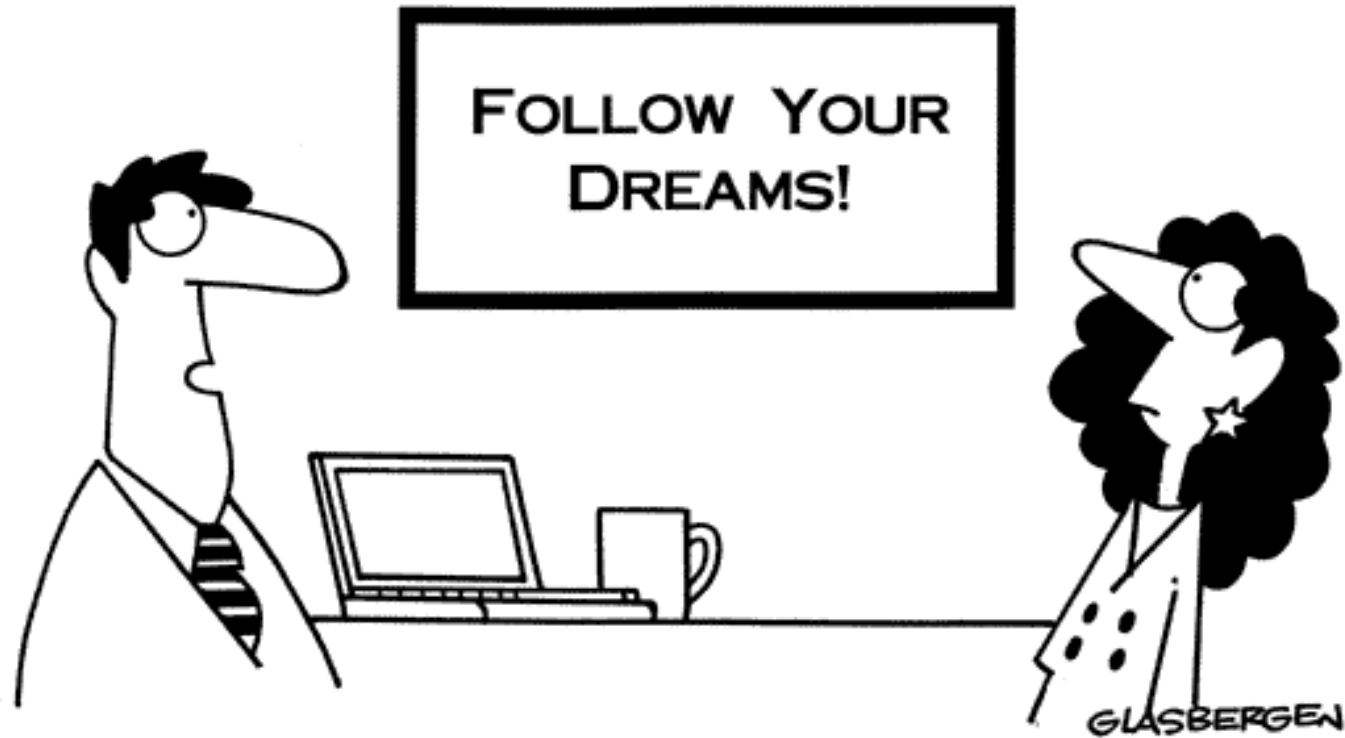


# BALANCED SCORECARD OVERVIEW



# MISSION STATEMENT

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**"It's supposed to inspire, but most employees see it as permission to take a nap."**



# BALANCED SCORECARD - IMPLEMENTATION

## Step 1

- Translate vision and strategy into objectives and actions
- Select critical measures – in each perspective

## Step 2

- Communicate and link to individual endeavors
- Motivate staff

## Step 3

- Monitor outcomes
- Adjust strategy, objectives and actions as needed

# CUSTOMER PERSPECTIVE

## Questions:

- How do our customers/patients see us?
- How do we create sustainable value for our customers?
- How is customer demand satisfied?

<b>Objectives</b>	Maintain strong customer satisfaction
<b>Measures</b>	Web-based satisfaction survey
<b>Targets</b>	90% overall satisfaction in both services
<b>Initiatives</b>	Scheduling w/in 24 hours, on-time or explain, staff introductions, clarify directions

# INTERNAL PERSPECTIVE

## Questions:

- What must we excel at?
- What key operational processes are most critical?

<b>Objectives</b>	Identify behavioral health issues in primary care setting and successfully refer patients to counseling services.
<b>Measures</b>	Number of referrals that result in mental health visit.
<b>Targets</b>	Increase number of successful referrals from 74% to 85%.
<b>Initiatives</b>	Referral and case management system: continue provider coding of referrals, continue case manager tracking of referral outcomes and outreach to students who do not schedule counseling appointment, begin outreach to students who schedule counseling appointment and then no-show

# FINANCIAL PERSPECTIVE

## Questions:

- What return on investment do we provide our customers?
- What is the value added for the customer?
- How can we reduce costs?

<b>Objectives</b>	Monitor cost-of-care via at least one cost-of-care QI study per year
<b>Measures</b>	Number of x-rays ordered in compliance with Ottawa Ankle Rules
<b>Targets</b>	90% of compliance with Ottawa Rules
<b>Initiatives</b>	Ankle Exam form in EHR



# LEARNING & GROWTH PERSPECTIVE

## Questions:

- What can we improve?
- What internal processes need to be enhanced?

<b>Objectives</b>	Conduct an annual peer review process with medical, counseling, and health promotion staff
<b>Measures</b>	Consistency between intake notes and diagnosis; suicide assessment where appropriate; appropriateness of care; history appropriate to chief complaint; completeness of documentation
<b>Targets</b>	Percent compliance varies per service and criteria
<b>Initiatives</b>	Conduct review at the end of each semester; review results with each provider; provide training where needed

# EMPLOYEE PERSPECTIVE

## Questions:

- How satisfied are our employees?
- Do employees feel empowered?
- Are relationships strong and collaborative?
- Does the work environment inspire achievement and excellence?

<b>Objectives</b>	Conduct annual employee surveys
<b>Measures</b>	Alternate between employee satisfaction survey and 360 degree evaluation
<b>Targets</b>	Strong satisfaction and morale as measured via survey tools
<b>Initiatives</b>	Respond to quantitative and qualitative survey feedback (e.g., policy changes, improvements to communication, and individualized feedback)

# BALANCED SCORECARD – REPORTING TOOL

	<b>Objectives</b>	<b>Measures/Target</b>	<b>Outcome</b>	<b>Action Plan</b>
<b>Customer</b>				
<b>Internal</b>				
<b>Innovation – Learning</b>				
<b>Financial</b>				