governWell™
Better governance. Better healthcare.

READ THIS BEFORE EDITING YOUR MEASUREWELL™ MATERIALS

Welcome to MeasureWell™. When completed, your unique and customized "dashboard" will help your board of trustees review and monitor key metrics in critical areas such as quality and patient safety, community health, financial and operating ratios, and more.

Too often boards of trustees assume that quality and patient safety, finance, workforce and community health are not an issue in their hospital unless they hear otherwise. Instead, boards should be asking specific questions to ascertain the hospital's current performance, and pinpoint the areas with the greatest need or opportunity for improvement or with the greatest implication to the hospital's success in achieving its vision and fulfilling its mission.

The MeasureWell™ dashboard is designed to help boards identify and select the indicators that are most important for the board to track for their hospital and community. Each hospital's dashboard should be unique, reflecting its most critical needs and priorities. Indicators should be limited to high-level measures that will help the board identify trends and directions without becoming mired in too much detail. The MeasureWell™ dashboard template includes a broad range of potential measures, more indicators than any hospital should report to the full board on a regular basis. It is the board's job to identify and select only the outcomes measures most critical for the hospital to achieve, to be included in their unique dashboard. The indicators included in the MeasureWell™ dashboard template are designed to provide a starting point for dashboard development. In addition to the potential indicators provided in the template, the board should also consider other organization-specific measures for possible inclusion in their unique dashboard.

Boards of trustees should regularly review the dashboard, using the easy-to-read metrics as starters for deeper questions and assessing any potential need for action or change of direction. For example, workforce metrics may prompt the board to ask why the hospital's turnover rate is increasing, what is being done to address it and when the board might expect to see an improvement in the metrics. An increase in preventable deaths should spark a thorough board and leadership discussion about the cause or causes of the increase, what is or should be done to address the cause(s) and how the hospital will achieve its ideal goal of zero preventable deaths. Financial metrics help show the high-level picture, but boards must remember that patient satisfaction, quality and patient safety, and community health are all significant to financial success, and should be monitored as well.

What's Included in MeasureWell™

In addition to this "Read This Before Editing Your MeasureWell™ Dashboard" document, MeasureWell™ includes the following:

- OIG Dashboard Guidance – 2009 – This PDF document is a copy of the article entitled "Driving for Quality in Acute Care: A Board of Directors Dashboard," a report on the Office of Inspector General and Health Care Compliance Association Roundtable on hospital board of directors' oversight of quality of care. The report summarizes why dashboards are important, critical dashboard components, and more.

- Measures Included in Dashboard – This Microsoft Word document lists all of the measures included in the MeasureWell™ Dashboard, divided by category. *The list is comprehensive, and it is strongly recommended that you identify and select only a limited number of measures from each category in the list, to be included in your organization's unique governance dashboard.*

- MeasureWell Dashboard – This Microsoft Excel spreadsheet is the actual dashboard that your organization can modify to create a custom-tailored dashboard for regular review at your board meetings. It includes two "tabs":

    – One tab holds a dashboard containing all measures, which can be modified according to the instructions below.

    – The second tab includes the same dashboard, but with sample measures, color-coding, star ratings, and up and down trend arrows to give you an idea of how the final dashboard may be displayed. The components on this page (such as the stars and the arrows) can be copied and pasted as you see fit onto the actual dashboard for your organization.

How to Use These Materials

Custom-tailoring the dashboard for your hospital is a simple process:

- Review the measures included in the document "Measures Included in Dashboard"

    – Identify the measures that your board wants to include in its dashboard

    – Identify the measures that your board wants to remove from the dashboard

    – Identify additional measures that your board wants to add to its dashboard

- Modify the spreadsheet to match your desired components, using the instructions below as a guide. *While not necessary, some Microsoft Excel experience is helpful when modifying the dashboard spreadsheet.*

Updating the Dashboard Spreadsheet

- Copy and paste the file called "4 – MeasureWell Dashboard.xlsx" and save it to your computer with a new name. This allows you to keep and reference the original file if you decide to add additional measures in the future.

- In your new document, modify the spreadsheet found at the tab titled "Dashboard." The tab titled "Dashboard with Samples" is an example to demonstrate what some of the dashboard rows and columns may look like when your dashboard is completed.

- Replace the GovernWell™ logo with your hospital's logo:

  – Click on the GovernWell™ logo in the top right corner of the spreadsheet and press "delete."

  – From the top menu, select Insert – Picture. Select your organization's logo. When it appears, resize and drag it to the upper right-hand corner where the placeholder logo had been. Resize your logo as necessary to fit in the allotted space.

- Remove unwanted metrics:

  – Highlight the <u>entire row</u> you want to delete. To do this, on the far left side of the spreadsheet, click on the number of the row that you want to delete. For example, if you want to delete "Days of Cash on Hand" under "Finance," click on row number 10. The entire row should be highlighted (not just one box).

  – Once the full row you want to delete is highlighted, right click (keeping the row highlighted), and select "delete." Alternatively, when the row is highlighted, you can select "Delete – Delete Sheet Rows" from the top menu under the "Home" menu.

  – Repeat this process for every measure you want to remove. It is important that you remove the <u>entire row</u> for each measure you remove from your dashboard.

- Add additional metrics:

  – Highlight the row <u>below</u> where you want to insert the new metric. To do this, on the far left side of the spreadsheet, click the number of the row that will fall <u>under</u> the new measure you want to add. For example, if you want to add a new measure above "Days of Cash on Hand" under "Finance," click on row number 10. The entire row should be highlighted.

  – Once the full row is highlighted, right click (keeping the row highlighted), and select "insert." Alternatively, when the row is highlighted, you can select "Insert – Insert Sheet Rows" from the top menu under the "Home" menu. A new row should appear <u>above</u> the row you've highlighted

  – Type the name of the measure in the empty cell under the "Measure" column.

- Populate the dashboard with your organization's unique information

  – Change the column headings for the quarterly data (in gray) to match the quarters of data you want to represent in your dashboard. The dashboard template currently starts with Q1-2016. To change the text, simply click on or in the cell and type.

  – Enter actual data for each quarter by clicking on or in the cell you want to enter the data for. Type the information.

    ▪ The cells should be pre-formatted to the data-type used for each measure. In some instances, you may want to change the data type (for example, from a percent to a number or rate). To do this, right click on the cell and select "format

cells." Under the "Number" tab, select the category you want the cell to display as (for example, number, currency, etc.).

- Click "ok".

– Enter the pre-defined target identified by the board under the column heading titled "Target." This should be the benchmark your organization is comparing itself to. For example, your hospital's goals under Quality and Patient Safety may be based on the quality metrics of the top 10% of hospitals nationwide or in your geographic area.

– If you have entered several quarters of data, determine whether each dashboard indicator is moving in a positive direction, moving in a negative direction, or if there is little change in the measure's direction.

- For some measures, a downward trend is positive. For other measures, an upward trend is positive. The arrows indicate if the dashboard measure is moving in a positive direction, not if the actual measure number itself is moving up or down. <u>A positive movement will always result in an up arrow, and a negative movement will always result in a down arrow.</u>

- To insert an arrow, simply copy the cell from the "key" at the top of the document. Then paste the arrow you have copied into the "Trend" cell.

– Color-code the cells of actual data (the columns with the gray date headings) to reflect whether the actual data point meets or exceeds the targeted goal (green), falls below the goal (yellow), or falls significantly below the goal (red).

- If desired, modify the key at the top of the dashboard to match the standards determined by your organization (for example, your board may want red to represent anything that is more than 7% below the target goal).

- Use the key at the top of the dashboard to determine your calculation for green, yellow and red.

- Leave the actual number in each data cell black, but color-code the cell background. To do this, click on the cell. While the cell is highlighted, click on the cell coloring under the "Home" menu at the top. In the sample image below, the first color (yellow) represents the cell background color. The second color (black) represents the text color.
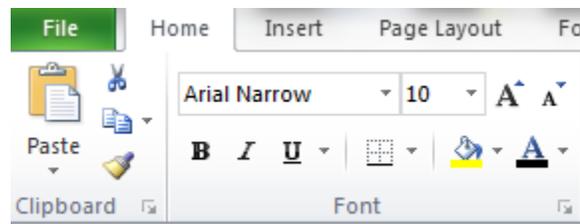
- To see an example of what a completed row with color-coding looks like, click on the "Dashboard with Samples" tab.

For Additional Assistance

If you have questions or need information, please contact us by calling (630) 613-7580 or by sending an e-mail to barb@governwell.net.