



"Organizing for Ambitious Goals: An Inter-departmental Approach to Strategic Planning Implementation"

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Outline

- St. Joseph's Health background
- Strategic Planning process 2021 – 2024
- Leveraging the Strategic Plan to achieve financial outcomes through project-teams

St. Joseph's Health Campuses

Paterson



Academic hub offering tertiary services and community medicine

Wayne



Suburban campus offering many niche programs, particularly in the outpatient arena

Totowa



Contemporary, full service, ambulatory center

Vision

Creating a healthier future for all ...
Inspired by faith, fueled by innovation
and driven by exceptional people.

Mission

St. Joseph's Health is a healing ministry of the Catholic Church sponsored by the Sisters of Charity of Saint Elizabeth. We are committed to sustaining and improving individual and community health, with a special concern for those who are poor, vulnerable and underserved.

Values

Dignity - Charity - Justice - Excellence - Stewardship

CENTERS OF EXCELLENCE

Largest employer in
Passaic County with

**OVER 5,400
TEAM
MEMBERS**

5th consecutive
**MAGNET
DESIGNATION**
Top In The Nation for
Nursing Excellence

1,333
Medical Staff
Providers

247
Residents
and Fellows



**A TOP
PROVIDER**
of charity care
in New Jersey



26,996
Admissions



**Over 400,000
Ambulatory
Encounters**

- ★ Cardiothoracic Surgery
- ★ Interventional Cardiology
- ★ Neuroscience / Neurosurgery
- ★ Advanced Endoscopy
- ★ Orthopedics & Orthopedic Surgery
- ★ Comprehensive Cancer Care
- ★ Pediatric Specialties and Centers of Excellence
- ★ Robotic Surgery
- ★ Women's OB/GYN, Perinatology & Neonatology
- ★ Emergency Medicine (Pediatric/Adult/Geriatric)
- ★ Level II Trauma Services
- ★ Global Telehealth and Physician Residency/Fellowship

Foreign Born Population Of St. Joseph's Patients Residing In Paterson

(Large Immigrant Population)

- 40.6% of Paterson is foreign born
(source: Census bureau)
- Approximately 40% of all St. Joseph's patients are foreign born.
- 44% of all St. Joseph's patients residing in Paterson are foreign born

Top 5 Countries/Foreign Born Patients

(Puerto Rico not included - but would be #2 if included)

1. Dominican Republic – 44%
2. Peru -11%
3. Bangladesh – 9.4%
4. Mexico - 6%
5. Columbia – 5.5%

© 2022 Mapbox © OpenStreetMap

Population Size

Less than 30

30 to 99

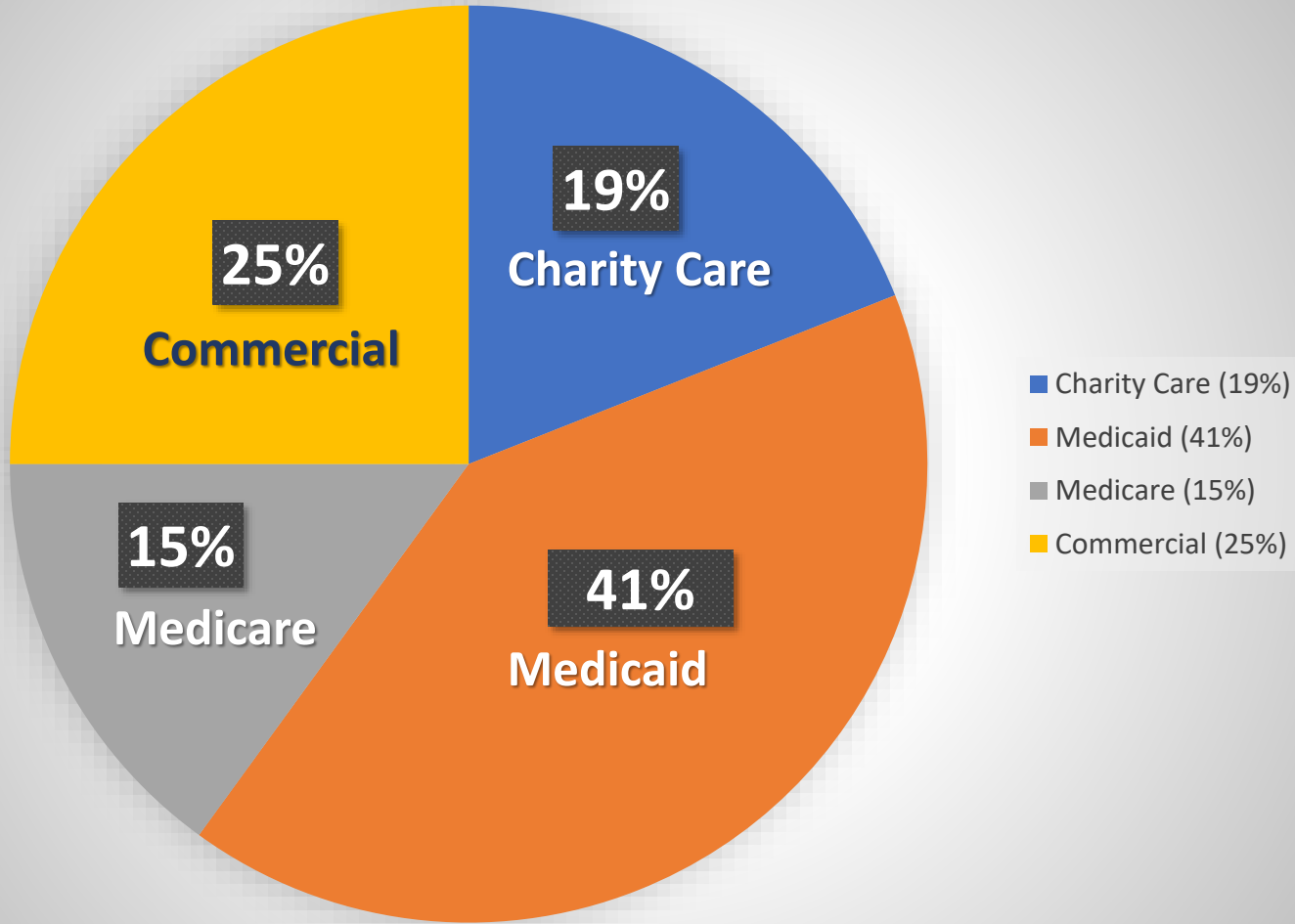
100 to 499

500 to 999

1,000 to 3,999

More than 4,000

SJH Patient Payer Mix



St. Joseph's Health is the 2nd largest provider of Charity Care in NJ, representing 7.7% of all charity care in New Jersey.

18.3% of Paterson residents (26,692) are uninsured, greater than double the rate of NJ's (7.4%)

Anchor Institution

An aerial photograph of a city landscape. In the foreground, a river flows through a rocky area. To the left, there are trees with vibrant autumn foliage in shades of yellow, orange, and red. In the center, a large, circular stadium with a dark roof is visible. Behind the stadium, there are several large, multi-story buildings, including a prominent red brick industrial-style building. In the background, rolling hills or mountains are visible under a cloudy sky.

Total Net Community Benefit

\$82,424,805

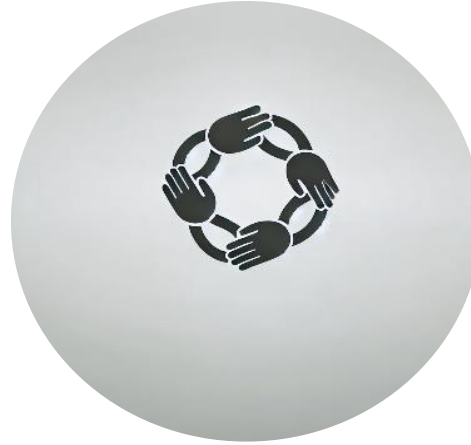
Annual Contributions to Local & State Economies:

- 5,400 Employees
- Total expenditures of \$908 million
- Total employee salaries of \$450 million
- \$154 million in services purchased from other businesses
- \$19.1 million in state income taxes paid by employees

Strategic Planning Cycle 2021-2024



Developed while the organization was heavily focused on COVID. Entire planning process lasted 16 months.

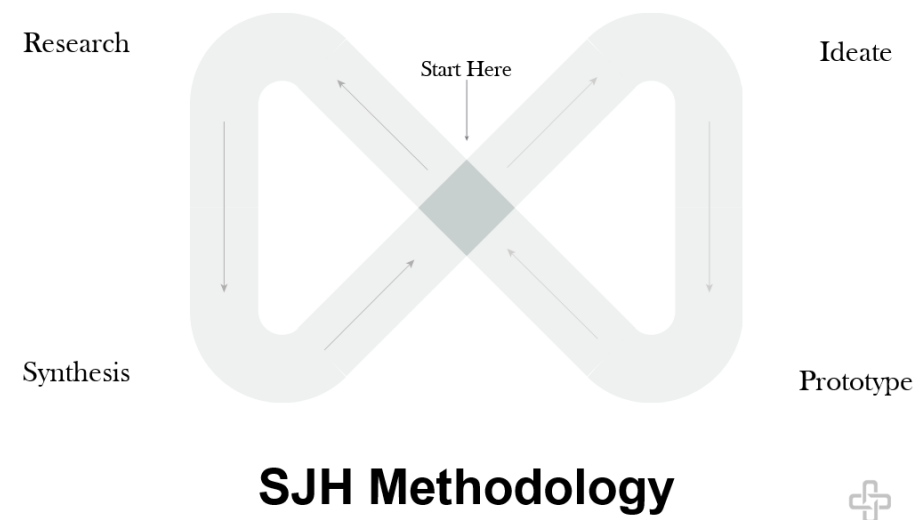


Process utilized tools of innovation & Human Centered Design.



Planning emphasized collaboration, community, and elevating the organization to the next level.

Strategic Planning Using Tools of Innovation



45%

RESPONSE RATE
(116 Respondents)

840

DATA POINTS
As of 11/15/20, based on 6
Micro-Sprint Questions. Not
including Interviews

30

PARTICIPANTS
Through one week of 7 sessions.
Additional interviews are
scheduled.

24

DEPARTMENTS
Foundation Ops, Nursing, Cancer Center, Clinical
Community Engagement, Clinically Integrated
Network, Pharmacy, Information Services, Pediatrics,
HCPC, Rehabilitation, Trauma, Stroke, Revenue
Integrity, Psychiatry, Cardiac Cath, Financial Systems,
Nursing Informatics, Benefits, Corporate and
Foundation Relations, Talent Acquisition, Children's
Hospital, Radiology, Access, and Patient Experience.

Sample of Tools

SJH 5-YEAR ROLLING STRATEGY PROCESS FRAMEWORK

STRATEGIC ↓ TACTICAL	Priorities	ACCESS <small>Enhancing our ability and experience for receiving care</small>	HEALTH EQUITY <small>Better addressing the Social Determinants of Health</small>	TRANSFORMATION <small>Disrupting processes to be a disruptor in healthcare</small>
	Goals			
	Focus			
	Success			
	Metrics			
	Initiative(s)			

Strategic Opportunities

#1 PRIORITY: 37

SDoH + Vulnerable Home/Remote Care Aging Population

#2 PRIORITY: 11

#3 PRIORITY: 10

- Affordability (6)
- Innovation (5)
- Primary Care* (3)
- Industry Partnerships* (3)
- Disruptors (3)
- Education + Community Outreach* (1)
- Tech + Medicare (1)
- Consumerism (0)
- Modern Workforce (0)
- Affordable vs Durable (0)

* New additions



SDOH + VULNERABLE



AGING POP



CONSUMERISM



HOME/REMOTE CARE



WORKFORCE



TECH + MEDICARE



AFFORDABILITY



DISRUPTORS



INNOVATION



AFFORD VS DURABLE

Group 1 - Board Room
1. SDoH + Vulnerable (6)
2. Innovation (3)
3. Aging Pop (1)

Group 2 - Auditorium 1
1. SDoH + Vulnerable (6)
2. Affordability (3)
3. Innovation (1)

Group 3 - Auditorium 2
1. SDoH + Vulnerable (6)
2. Primary Care (3)
3. Home/Remote Care (1)

Group 4 - Auditorium 3
1. Home/Remote Care (6)
2. Industry/Partnerships (3)
3. Edu/Community (1)

Group 5 - GEM 3B
1. SDoH + Vulnerable (6)
2. Disruptors (3)
3. Home/Remote Care (1)

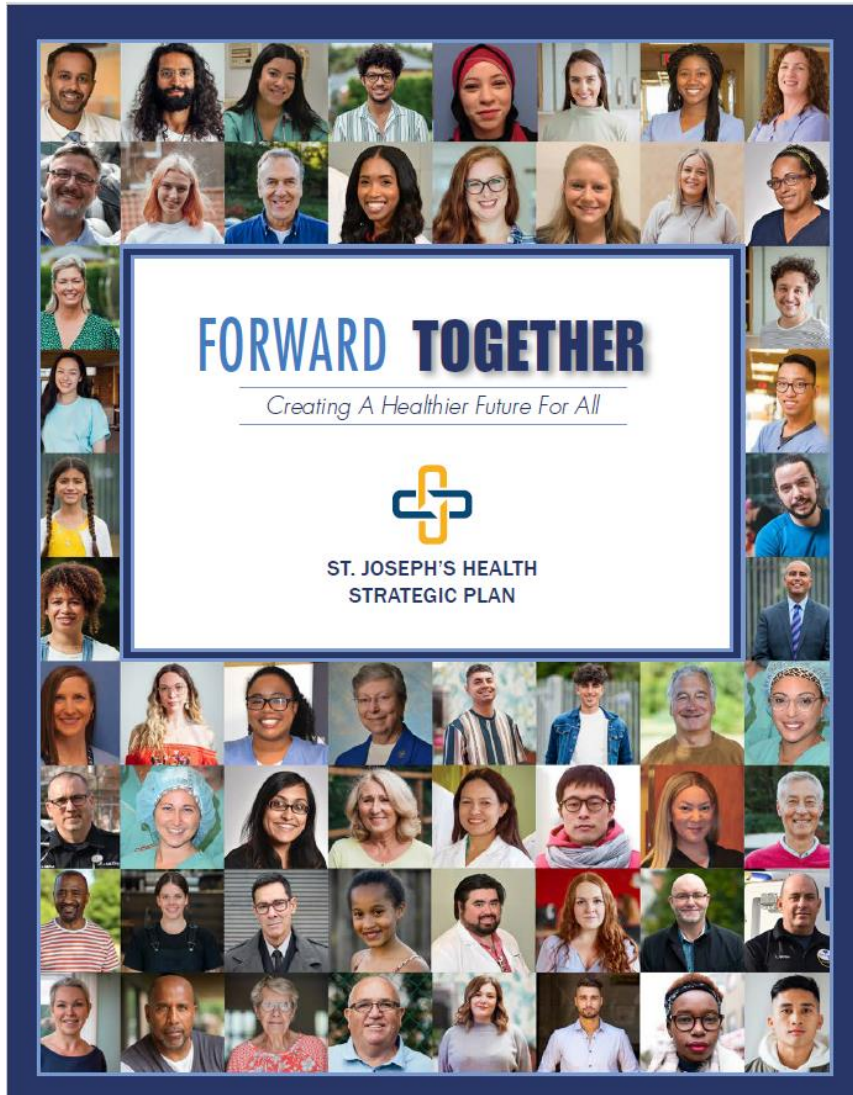
Group 6 - Innovation Lab
1. SDoH + Vulnerable (6)
2. Home/Remote Care (3)
3. Innovation (1)

Group 7 - Virtual
1. SDoH + Vulnerable (6)
2. Aging Pop (3)
3. Technology (1)

Group 8 - Virtual
1. Aging Pop (6)
2. Affordability (3)
3. SDoH + Vulnerable (1)

Synthesis of feedback from small groups
SJH Board Retreat September 2020

Strategic Plan 2021 - 2024



- **Strategic Priorities**

- Bridging the Gap of Social & Health Equity
- Navigating the Way to Wellness
- Transforming the Future through Innovation

- **Foundational Priorities**

- Mission & Community
- People, Leadership & Academics
- Quality, Safety & Experience
- Operations & Technology
- Finance & Philanthropy

- **160 initiatives defined through the 8 Priorities**

Implementation of Forward Together Plan



Monitoring of plan via dashboard
reported bi-annually



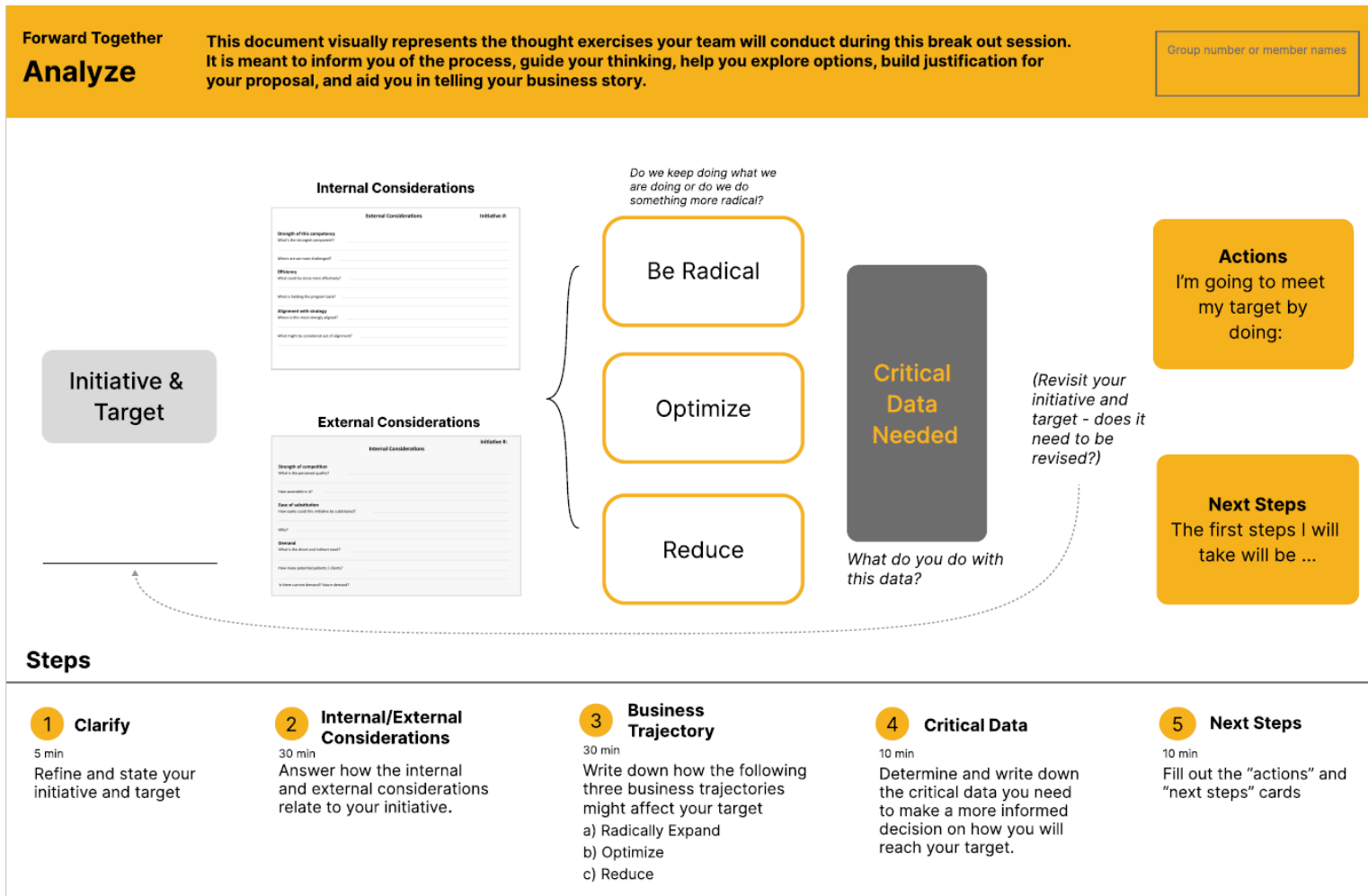
Due to financial pressures, initiatives
in Strategic Plan were explored for
revenue and/ or cost savings
opportunities.

Target: Economic Value of \$40 M



42 teams deployed to achieve
financial goals. 13 teams deployed to
achieve health equity goals.

Exploration of ideas, based on Forward Together Initiatives



Sample of Tool

Forward Together

Roadmap

This document provides a framework for a **6 month initiative roadmap** that will get us to your ultimate defined target. Use it to guide your thinking 1) to define the steps you will take to reach your target, 2) the actions you will need to complete each step, and 3) the people who will be responsible for moving this step forward.

Days

6 months

3 years

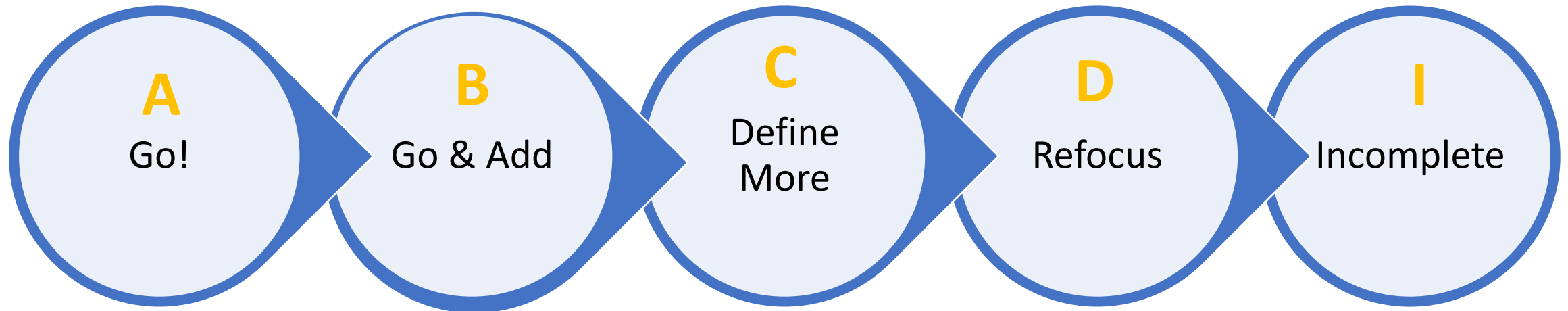
Topic/Program:

Multi year Goal of specific objective:

Step						
Date						
Action	1.	1.	1.	1.	1.	1.
	2.	2.	2.	2.	2.	2.
	3.	3.	3.	3.	3.	3.
Key people involved						

Scoring System

58 submissions were bucketed into the following categories



Readiness to Proceed - Initial Review

A Go!

- Lab
- Pharmacy
- Supply chain standardization

B Go & Add

- Behavioral Health
- MD practices
- Community Medicine
- Totowa Health Campus
- Rehab
- Clinical penalties/incentives
- Premium staffing
- Maternal Child Health
- Cardiology
- Balance sheet management
- Capital investments
- Radiology
- Revenue Cycle

C Define More

- Public & private funding
- Clinical variation/LOS
- Clinical operating efficiency
- Emergency Services
- Additional service lines
- Joint ventures
- Medicaid strategy

D Refocus

- Academics
- Employee health plan cost
- Position control/labor cost
- Legal costs
- Compliance/internal audit

I Incomplete

- Cancer
- Real Estate
- Energy

Forward Together Implementation– *Health Equity*

Employee Initiatives

Exec: Pia, Sr. Pat
OTL: Karen Brown
PM: Lindsey Duffy

Health Outcomes

Exec: Lisa Brady
OTL: Dr. Mallamaci
PM: Peter Rinaldi

Outreach & Purchasing

Exec: Ken Morris
OTL: Deb Regen
PM: Matthew Kostinas

Initiative 1:
Unconscious
Bias Training

Initiative 2:
Hiring

Initiative 3:
Policy
Review

Initiative 4:
Affinity
Group Voice

Initiative 1:
Workgroup
members
Morse,
Carrion

Initiative 2:
Workgroup
members
Charlotte

Initiative 3:
Workgroup
members
Linette

Initiative 3:
Workgroup
members
Karen

Initiative
1:
CMS
Health
Equity

Initiative
2: SDoH
Measures

Initiative
3:
Perinatal
Health

Initiative
4:
Diabetes
& Weight
Mgmt

Initiative
5:
Equity in
Vascular
Access

Leader:
Janine
Begasse

Leader:
TBD

Leader:
Dr. Kierce
& Carla
Rizzo

Leader:
TBD

Leader:
Matt
Ostroff

Initiative
1:
Purchasing
Procurem
ent

Initiative 2:
Purchasing
Capture Data
– Non GPO
Vendors

Initiative 3:
Outreach -
TBD

Initiative 4:
Health
Careers
Training &
Education

Leaders:
Al
Casanova
& Juan
Matias

Leaders:
Al Casanova
& Juan
Matias

Leaders:
Cloris
Bustamante
& Lea Gould

Leaders:
TBD

Initiatives & Targets

Navigating the Way to Wellness

Range of Services

- Totowa Health Campus
- Physician Network Development
- Service Line/Program Alignment
- Joint Venture Performance

\$20M

Population Health Management

- Value-based contracts
- Medicaid programs

\$5M

People, Leadership & Academics

Employer of Choice

- Employee Health Plan spending
- Premium staffing expense
- Position control

\$4M

Academics

- Teaching program portfolio management

\$500K

Quality, Safety & Experience

Quality Outcomes

- Pay for performance
- Operational efficiency

\$2M

Initiatives & Targets

Operations & Technology

Efficiency & Standardization

- Standardize business functions
- Real estate
- Productivity
- Opportunities Action Plans (OAP)
- Energy Usage

\$8M

Finance & Philanthropy

Philanthropy

- Grant funding
- Gifts

\$5M

Financial Strength

- Revenue cycle improvements
- Balance sheet management
- Capital

\$15.5M

Team Structure & Project Selection



42 projects selected based on submitted ideas

Examples include:

- “Reduce Premium Staff Expenses”
- “Reduce Waste by Standardizing Business Functions”
- “Improve Financial Performance of Cancer Services”



Team Members

Composition:

- Executive Sponsor
- Operating Team Lead (OTL)
- Project Manager
- Team Members

Project Plans Developed

- Project Management Office (PMO) was engaged to provide support for project development and monitoring for each project. This was an expansion in scope for SJH PMO.
- Detailed project plans were developed.
- Teams met weekly or bi-monthly
- Economic value validated by finance team

	FORWARD TOGETHER 22: PHYSICIAN ENTERPRISE MONTHLY FINANCIAL REPORT										
FOR THE MONTH OF:	10/2023	REPORT DATE:	11/13/2023								
TOTALS ==>	\$0	\$0	\$0		\$0	\$529,611	\$0	\$529,611		\$0	
PROJECT ACTIVITY	SAVINGS					REVENUE					NOTES
	Actual Year-to-date	Expected Remainder 2023	Total Expected 2023	Certainty of Achieving 2023 Savings	Expected 2024	Actual Year-to-date	Expected Remainder 2023	Total Expected 2023	Certainty of Achieving 2023 Revenue	Expected 2024	
Reduce eligibility and authorization denials			\$0					\$0			This increase by 32% because of the Horizon issues we are having Decreased by 35% compared to 2022
Decrease bad debt			\$0					\$0			
Expand Digital Front Door			\$0					\$0			
Increase self-pay collection by 15%			\$0					\$0			Self Pay collection has decreased 6% in 2023 compared to 2022
Increase Revenue - APN Billing an others	\$0	\$0	\$0	N/A	\$0	\$344,511		\$344,511			
Decrease Denials by 15%			\$0					\$0			Decreased by 53%
Employee Health			\$0					\$0			
Advanced Primary Care			\$0					\$0			
HOPD Cardiology Practices			\$0					\$0			Assumes average \$60 per new patient visit (3085 new visits in 2023).
Increase new patient visits	\$0	\$0	\$0	N/A	\$0	\$185,100		\$185,100	Certain		

Example of Project Report Template

Distributed to Executive Team monthly

Project Manager: Lindsey Duffy		FT 1 Reduce spending on academics				Month Ending 6/2/2023	
Financial Goal: \$500,000		Monthly Project Status Report					
Project Overview		Reduce spending on academics through standardizing expenses across programs					
Executive Sponsor:	Joe Duffy, Kevin	Start Date 3/13/2023	Original Target 3/27/2026	Est Close-Out 4/24/2026	2023 Goal	2024 Goal	2025 Goal
Team Lead:	Lindsey Duffy				\$100,000	\$200,000	\$200,000
Physician Sponsor:					2023 YTD	2024 YTD	2025 YTD
					\$0	-	-

Project Performance and Health

	% Complete	Overall	Scope	Schedule	Cost	Resources
Current	10%	Green	Green	Green	Green	Green
Previous	0%		Green	Green	Green	Green

Performance Summary/Go-to-green Plan

0

Green: On Track	Yellow: At risk. Attention required.	Red: Not met Immediate action required.
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Critical Issues and Risks

NA

Key Accomplishments this Past Month	Upcoming Activities
Program requirement analysis complete; pertinent department specific financial information gathered	Develop analysis of ACGME program requirements vs. SJH actuals
<div>Dashboard Table of Contents 1 Academics 2 Real Estate 3 Energy 4 Supply Chain 5 Sen ... + ⋮</div>	

Reporting & Monitoring



Monthly

Dashboard distributed to Executive Team
monthly



Quarterly

Deep dive with between project teams and
Senior Vice Presidents to identify barriers.

Quarterly Project Review Sessions



Key Individuals

Project teams
(responsible executive,
OTL, and PM) presented
progress to **Senior Vice
Presidents, Strategy
Team**, and
representatives from
Finance



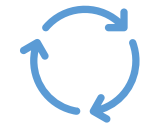
Rapid!

Teams were scheduled in
10-minute blocks



Key Elements

Successes
Barriers
Changed/ new elements
Financial progress to date

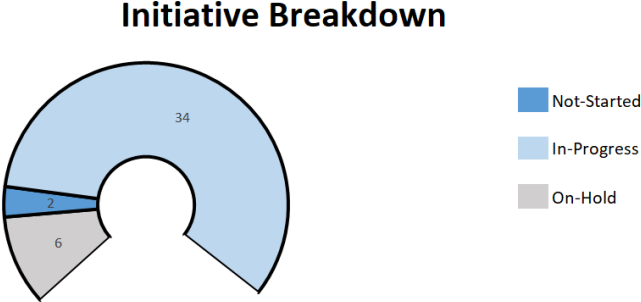
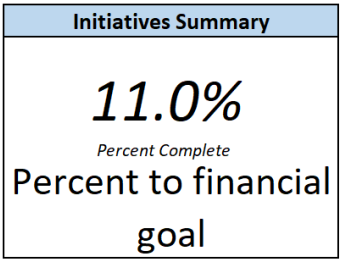
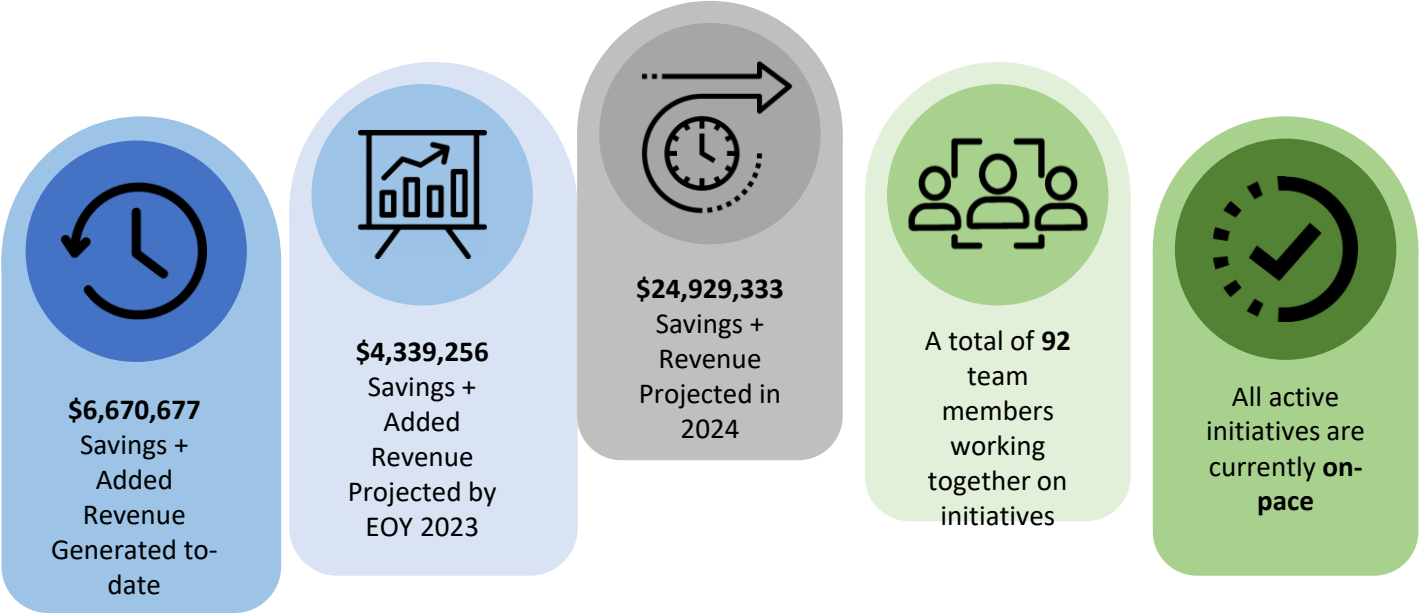


Repeated Quarterly

Sessions were very
successful. Many
decisions were made **on
the spot.**

Forward Together Financial Impact

(reported to Board of Trustees September 2023)

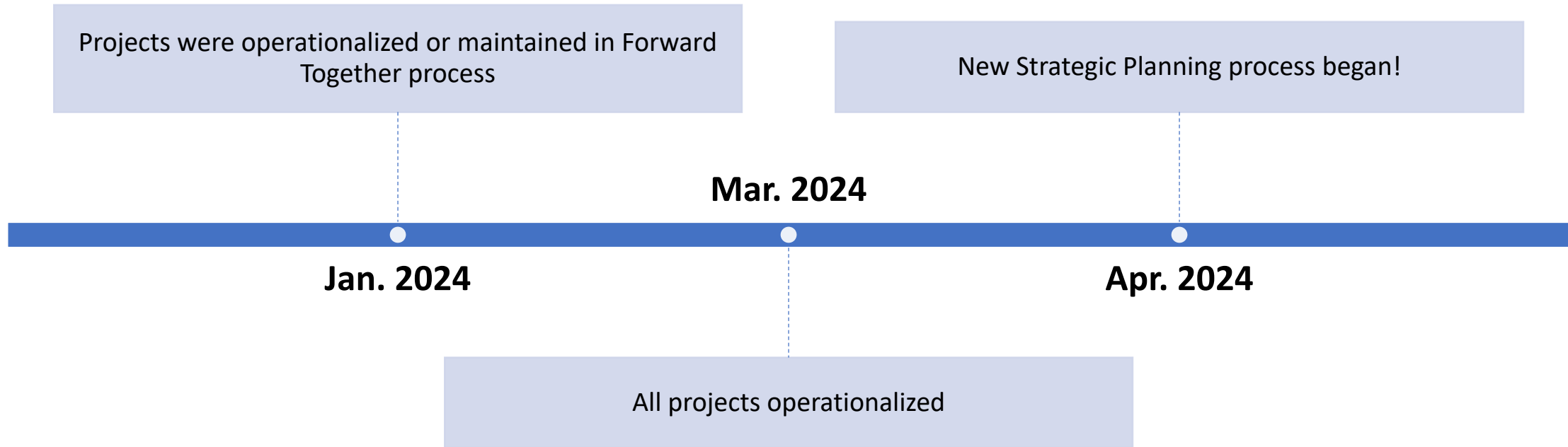


Dashboard

Metrics

Financial Summary			
2023	2024	2025	Total
\$11,009,933	\$24,929,333	\$35,610,734	\$71,550,000

Operationalization of Projects



Three Key Take-Aways

- Objective: to provide attendees with a real world example of leveraging the initiatives in a Strategic Plan for financial impact.
- Action Steps
 - Human-centered design and other tools of innovation are useful in gathering actionable ideas from teams across the organization
 - The tools shown in this presentation are examples of methods deployed to achieve and manage strategic plan objectives
 - Methods to engage various business units (i.e. Project Management, Finance etc.) to achieve a goal



Questions?

Please be sure to complete the session evaluation on the mobile app!

Lisa Brady

Senior Vice President, Chief Strategy Officer

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Lisa Brady serves as the Chief Strategy Officer at St. Joseph's Health responsible for guiding the overall strategic direction of the organization including overseeing the Center for Innovation, strategic planning, and enterprise analytics. Prior to transitioning to the CSO role in 2021, Lisa was the Executive Vice President and Chief Administration Officer at St. Joseph's.

Lisa has served as a Board Member for industry and community organizations including Health Education and Research Trust of New Jersey Hospital Association; Metro YMCA of the Oranges; the YWCA, Aurora, IL; United Way, Aurora, IL; Sunnymere Retirement Center, Aurora, IL.

Lindsey Duffy

Executive Director of Strategic Planning

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Lindsey Duffy serves as the Executive Director of Strategic Planning at St. Joseph's Health responsible for development and implementation of the strategic direction of the organization. As part of that responsibility, she facilitates business development, organizational partnerships, and market analytics. Lindsey earned a Bachelor of Science and Masters of Healthcare Administration, both from The University of Scranton.