

MANAGING THROUGH DASHBOARDS

Traci Donnelly
CEO and Executive Director



**THE CHILD
CENTER OF NY**

Strengthening Family. Building Community.

IMPACT OF DASHBOARDS ON CLINICS



Face-to-face time
Increased by

44%

From 18 to 26 hrs/wk

Broken appts
Decreased By

35%

From 26% to 17%

Collection rates
Increased by

5%

From 92% to 97%

IMPACT OF DASHBOARDS ON HOME VISITING (SHORT TERM)



Face-to-face time
Increased by

27%

From 167 to 212 hrs/mo

Billable units
Increased by

11%

From 36 to 40 units/mo

IIH sessions
Increased by

129%

From 35 to 80 sessions/mo

DASHBOARD DEVELOPMENT



Process flow
of operations
and data
systems

Identify **key metrics** and
operational
pain points

Research and
implement
operational
best practices

Track all
program
activity
electronically

Develop dashboards to
assist in
managing
culture change

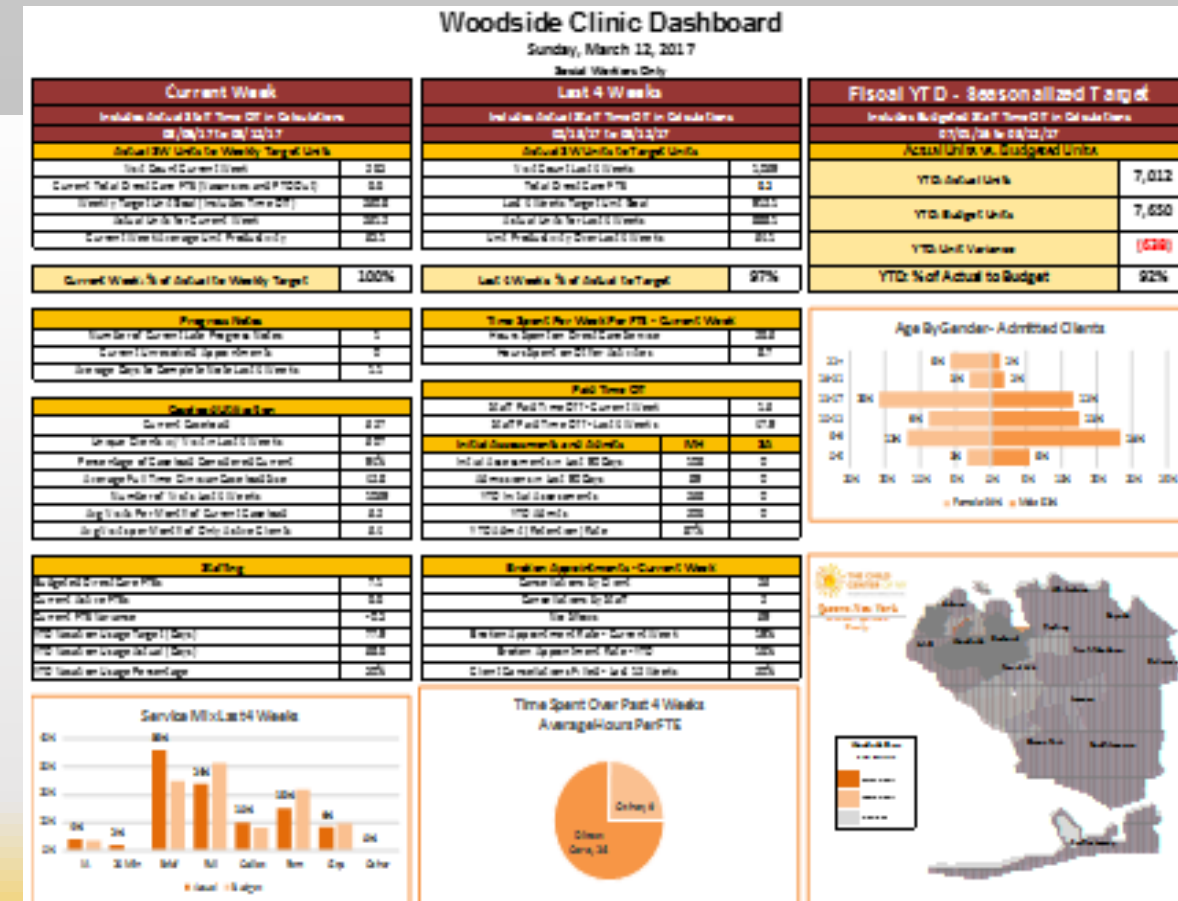
As operations
become
efficient, focus
on **outcomes**

DASHBOARD DETAILS



Program Summary

A program summary provides program directors an aggregate level view of their program. This helps to understand populations, geographies, service mix, and other metrics at a clinic-wide level to ensure that expectations are met.



DASHBOARD DETAILS



Staff Productivity

By analyzing staff performance down to the level of each worker, management never has to guess which staff are top performers. Also, making dashboards fully transparent to all staff allows for a sharing of best practices. Viewing each staff's performance also highlights exactly where problems exist.

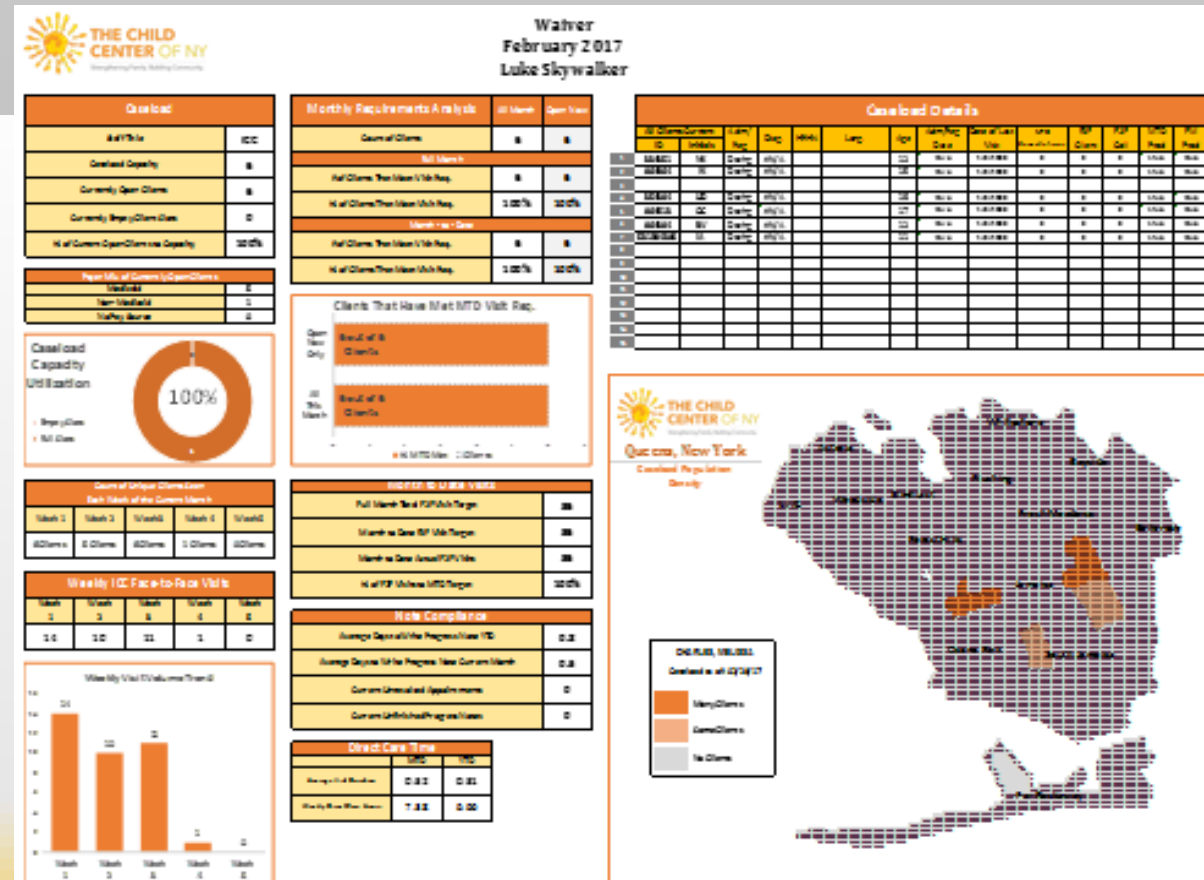
Full Time	Current Week				
	Actual vs. Goal of 35 Units/Wk PTO Factored In				
Staff Name	Hours	Wk Goal	Actual Units	Actual vs. Target	Credit Hours
Darth Vader	0	0.0	0.0	0.0%	-
Boba Fett	0	0.0	0.0	0.0%	-
Leia Organa	32	32.0	33.1	103.4%	-
Han Solo	28	28.0	27.3	97.5%	-
Luke Skywalker	35	35.0	29.7	84.9%	-
Chewbacca	35	33.8	31.4	92.9%	1.3
Lando Calrissian	28	28.0	31.1	110.9%	-
Yoda	35	35.0	29.2	83.3%	-
	0	0.0	0.0	0.0%	-
	0	0.0	0.0	0.0%	-
	0	0.0	0.0	0.0%	-
	0	0.0	0.0	0.0%	-
	0	0.0	0.0	0.0%	-
Full Time Total	193		181.7	94.7%	1

DASHBOARD DETAILS



Caseload Analysis

By producing caseload reports that analyze client activity managers are able to quickly spot issues like late treatment plans, lack of visits, service types, etc. By analyzing caseloads in home visiting programs, managers are also able to visually see if catchment areas are being maintained, when visits are being concentrated during the month, and other caseload trends.



PROGRAM DESIGN USING DATA



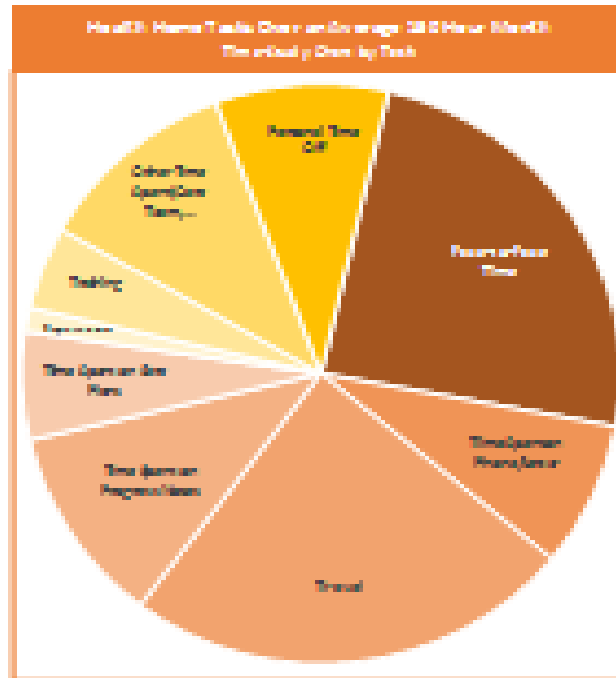
Health Home Time Study Average Monthly Time-Spent Projection

Average Contract Value	\$50
Average # of Clients in Contract	20.0

Category	High	Medium	Low
High	20.0	15.0	10.0
Medium	15.0	10.0	5.0
Low	10.0	5.0	0.0

Assume Item	High	Medium	Low
Average Number of Clients	10.0	20.0	30.0
Average # of Monthly Visits	5	3	1
Average # of Monthly Phone, Lesson...	5	3	1
Average # of Monthly Home-Phone Visits	10	10	10
Average # of Monthly Phone, Lesson...	10	10	10
Average # of Monthly Home-Phone Visits	10	10	10
Average # Care Plans per Month	1	5	1
Average # of Care Plans	10	10	10
Average # of Home-Phone Visits	10	10	10
Average # of Home-Phone Visits	10	10	10

Tasks	High Hours	Medium Hours	Low Hours	Total Hours
Time Spent on Visits	50.0	100.0	30.0	180.0
Time Spent on Phone/Lesson	50.0	50.0	10.0	110.0
Time Spent on Home	50.0	100.0	30.0	180.0
Time Spent on Program Notes	10.0	50.0	10.0	70.0
Time Spent on Care Plans	10.0	10.0	10.0	30.0
Time Spent on Home-Phone	10.0	10.0	10.0	30.0
Time Spent Training	10.0	10.0	10.0	30.0
Other Time Spent (unclassified)	10.0	10.0	10.0	30.0
Personal Time OIT	-	-	-	0.0
Total Time Spent (Hours)	120.0	370.0	170.0	660.0



Time Study

When developing a new program, it is important to understand, down to the hour, how your direct care workers will spend their time. This time study will allow you to develop productivity targets, determine very accurate revenue projections, as well as inform job descriptions.

FINANCIAL DASHBOARDS



Contract Billing Summary

As dashboards highlight the accomplishments and assist programs in fixing program issues, it is important to ensure that the efforts of the programs are mirrored by equal efforts by central support staff. Contract billing, in particular, needs to be carefully monitored to ensure fiscal viability and program success.

Revenue Analysis by Biller					
Accountant	# of Funds	FY17 Annual Budget	FY17 YTD Budget Through January 2017	FY17 YTD Actual Through January 2017	FY17 Actual / FY17 Budgeted Revenue
Anakin Skywalker	15	\$10,523,563	\$6,138,745	\$6,015,970.18	98%
Leia Organa	11	\$3,526,483	\$2,057,115	\$2,098,257	102%
Luke Skywalker	13	\$12,563,598	\$7,328,766	\$6,302,738	86%
Padme Amidala	12	\$11,570,941	\$6,749,715	\$4,387,315	65%
Obi-Wan Kenobi	12	\$7,562,351	\$4,411,371	\$4,234,917	96%
Boba Fett	9	\$4,166,951	\$2,430,721	\$2,552,257	105%

THE CHILD CENTER OF NY Contract Billing Analysis

Revenue Analysis by Biller						Current Accrual	
Accountant	# of Funds	FY17 Annual Budget	FY17 YTD Budget Through January 2017	FY17 YTD Actual Through January 2017	FY17 Actual / FY17 Budgeted Revenue	FY17 YTD Through January 2017	FY17 YTD Months Billed as Billing
Anakin Skywalker	15	\$10,523,563	\$6,138,745	\$6,015,970.18	98%	\$192,274	1.4 Months Billed
Leia Organa	11	\$3,526,483	\$2,057,115	\$2,098,257	102%	\$426,814	3 Months Billed
Luke Skywalker	13	\$12,563,598	\$7,328,766	\$6,302,738	86%	\$448,538	1 Month Billed
Padme Amidala	12	\$11,570,941	\$6,749,715	\$4,387,315	65%	\$189,253	7 Months Billed
Obi-Wan Kenobi	12	\$7,562,351	\$4,411,371	\$4,234,917	96%	\$845,488	4 Months Billed
Boba Fett	9	\$4,166,951	\$2,430,721	\$2,552,257	105%	\$845,241	3 Months Billed

Highest Revenue Accruals: FY17 YTD Through January 2017								
Rank	Annual	Division	Fund	Program	Program Director	Biller	Monthly Billing Expectation	Months Billed (Revenue Received Annual / Monthly Billing)
1	\$483,518	PRV	15	Tutoring	Max Sale	Anakin Skywalker	\$482,274	3.5
2	\$252,414	VDD	18	Orch Star	Kyle Eric	Leia Organa	\$25,843	3.5
3	\$133,383	Healthcare	157	Walk	B2-D2	Luke Skywalker	\$25,888	8.8
3	\$133,249	VDD	14	Caravan	C-3PO	Padme Amidala	\$27,419	3.4
4	\$116,281	VDD	114	Milestones	Ray Padellaro	Obi-Wan Kenobi	\$28,281	4.8
5	\$104,488	VDD	116	Dropin	Cherianne	Boba Fett	\$42,456	4.3
5	\$102,845	VDD	188	Makes	Derek Mast	Anakin Skywalker	\$38,256	6.4
7	\$101,222	OTH	38	Music	General Grivana	Leia Organa	\$25,333	5.3
8	\$102,254	VDD	128	Musician	Max Yvonne	Luke Skywalker	\$45,844	3.5
9	\$108,102	ECO	167	Dance	Linda Coltrane	Padme Amidala	\$18,238	N/A
10	\$127,233	VDD	181	Kenia	Captain Phoenix	Obi-Wan Kenobi	\$47,538	2.7