



Trustee Services

Sample Template for a Strategy and Competency Self Assessment

Introduction

The American Hospital Association's report, *Hospitals and Care System of the Future*, describes a series of "must do" strategies and future core competencies hospitals will need as they transform themselves from first curve to second curve delivery systems, driven by a shift from volume-driven to value-driven payment systems.

The survey tool and discussion stimulator on the next page draws on the strategies and core competencies in the report.

For each one, the survey asks participants to indicate where their organization stands today on each strategy and competency, and where they want to see the organization in the future, e.g., five years.

Ten Must-Do Strategies

For each strategy below, indicate where the organization stands today on implementing each strategy, and how far along it should be in five years, using the following scale:

- 1 No strategy for this and no agreement to develop one
- 2 Just beginning to clearly define and develop this strategy
- 3 Strategy is defined, implement underway
- 4 Strategic implementation largely implemented and showing results
- 5 Strategic implementation fully implemented and showing results

1. Aligning hospitals, physicians, and other providers across the continuum of care

	1	2	3	4	5
Current					
Five Years					

Comments:

2. Utilizing evidenced-based practices to improve quality and patient safety

	1	2	3	4	5
Current					
Five Years					

Comments:

3. Improving efficiency through productivity and financial management

	1	2	3	4	5
Current					
Five Years					

Comments:

4. Developing integrated information systems

	1	2	3	4	5
Current					
Five Years					

Comments:

5. Joining and growing integrated provider networks and care systems

	1	2	3	4	5
Current					
Five Years					

Comments:

6. Educating and engaging employees and physicians to create leaders

	1	2	3	4	5
Current					
Five Years					

Comments:

7. Strengthening finances to facilitate reinvestment and innovation

	1	2	3	4	5
Current					
Five Years					

Comments:

8. Partnering with payers

	1	2	3	4	5
Current					
Five Years					

Comments:

9. Advancing an organization through scenario-based strategic, financial, and operational planning

	1	2	3	4	5
Current					
Five Years					

Comments:

10. Seeking population health improvement through pursuit of the —triple aim

	1	2	3	4	5
Current					
Five Years					

Comments:

11. Additional Strategies: Are there strategies not on the list that are important for our organization?

Assessing Core Organizational Competencies for the Future

Instructions: For each competency, indicate where the organization stands today on having the competency, and how far along it should be in five years, using the following scale:

- 1 Little or no competency
- 2 Beginning to develop
- 3 Moderately competent, clearly progressing
- 4 Well on the road, showing results
- 5 Highly competent – an organizational strength, best in class

1 Design and implementation of patient-centered, integrated care

Future State Questions: Have we developed a clear and compelling approach to clinician alignment and integration? Are we developing sufficient capabilities to measure, manage, and improve the quality and efficiency of patient care across the continuum of care? How are we rapidly assimilating best practices into clinical medicine? What is our role in improving overall population health?

	1	2	3	4	5
Current					
Five Years					

Comments:

2 Creation of accountable governance and leadership

Future State Questions: Does the board drive the organizational strategy for moving toward the second curve while assessing the balance of risks and rewards? Does the board have an explicit succession planning process in place to ensure the selection and development of leaders with the right attributes? Does physician/clinician engagement in governance and management activities reflect their emerging roles as economic and clinical partners? Does the board have the appropriate competencies for executing the must-do strategies? Is there transparency in the communication of patient outcomes, financial results, and community benefit to the community?

	1	2	3	4	5
Current					
Five Years					

Comments:

3 Strategic planning in an unstable environment

Future State Questions: Do we have a clear/compelling vision for the second curve? Do we have a plan and timeline for moving toward the second curve of value-based care delivery, as compared to current financial incentives? What is the necessary mix of inpatient beds, ambulatory facilities, physicians, midlevel providers, and emerging technologies to meet future demand?

What size and scale of our organization will be sustainable in the future?

Should our organization explore new strategic partnerships? What type of organization best meets our needs while still fitting with our mission? Are we utilizing scenario-based planning techniques to monitor key changes in our assumptions and making necessary adjustments? Do we assess the health needs of the community we serve? Do we also identify potential partners to improve access to necessary care?

	1	2	3	4	5
Current					
Five Years					

Comments:

4 Internal and external collaboration

Future State Questions: Have we examined our mission to determine if we can financially sustain high quality in all of the services we currently provide? How well are we developing trust within our organization? What is our desired culture? Does it value collaboration, accountability, transparency, excellence, patient focus, and similar core values? Are our leaders role models for a collaborative culture? Are we considered a valuable partner to physicians and other organizations within the community? Do we know our partners well enough?

	1	2	3	4	5
Current					
Five Years					

Comments:

5 Financial stewardship and enterprise risk management

Future State Questions: Do we have a capital investment plan for testing strategic activities in payment pilot projects and health management strategies (e.g., service line management, population health, use of health information technologies)? Can we measure revenues and expenses by each clinical service? Are we utilizing an annual enterprise risk management assessment? Have we identified long-term financial goals and a plan to get there?

	1	2	3	4	5
Current					
Five Years					

Comments:

6 Engagement of employees' full potential

Future State Questions: What is our strategy for employee and physician partner engagement? Are our employee and physician recruitment and retention systems aligned with our strategic direction and desired culture? For example, how are we assessing performance and values of collaboration? Are we a learning organization? How are we developing the knowledge and skills of physicians, middle managers, employees, and senior executives?

	1	2	3	4	5
Current					
Five Years					

Comments:

7 Collection and utilization of electronic data for performance improvement

Future State Questions: When will our information systems bring all pertinent information to the point of care? How far along are we in achieving digital connectivity among providers and with patients? How often is the data collected from information systems reviewed at clinical and administrative team meetings? What data is brought to senior leadership's attention?

	1	2	3	4	5
Current					
Five Years					

Comments: