

# MANAGING THROUGH DASHBOARDS

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**THE CHILD  
CENTER OF NY**

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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**

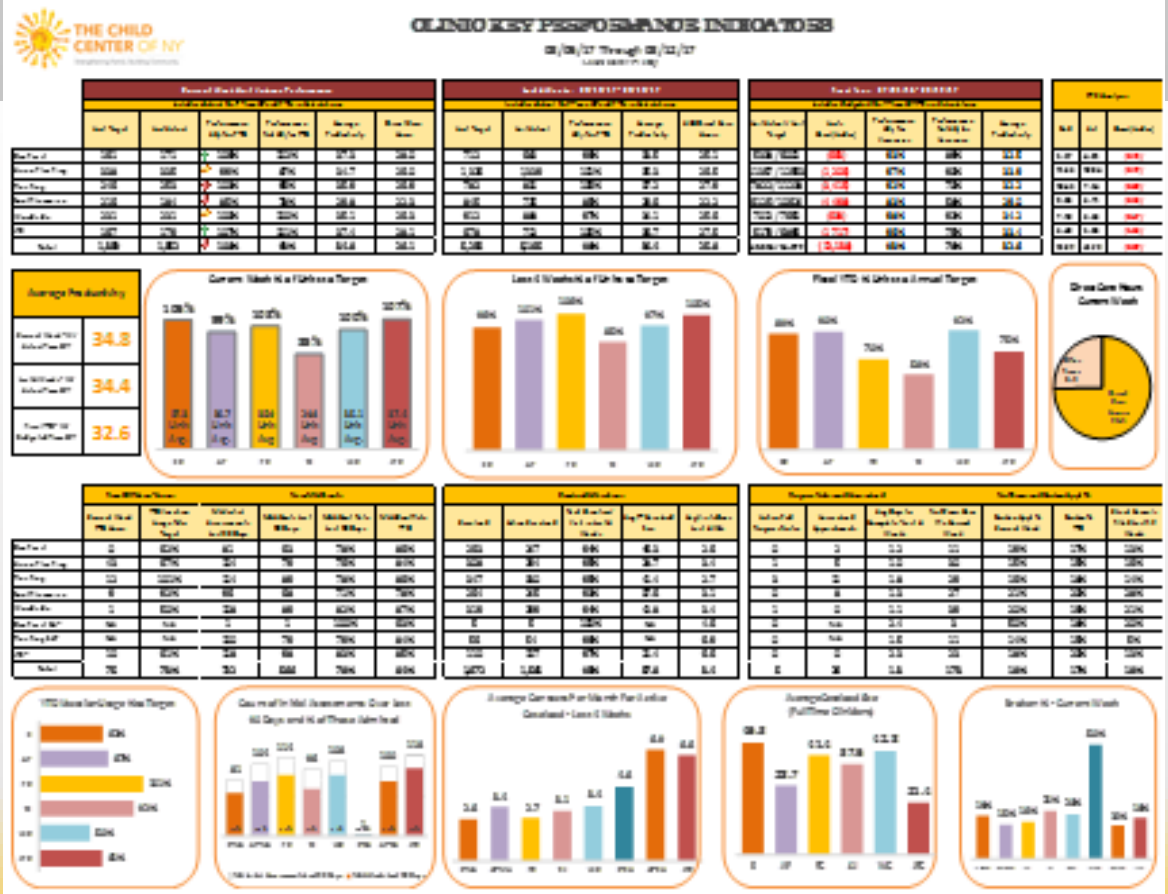
As operations  
become  
efficient, focus  
on **outcomes**

# DASHBOARD DETAILS



## Management Summary

A management summary allows senior management to quickly and consistently keep their pulse on the performance of programs at a level that summarizes the key metrics. The CEO can view this document and, in a matter of seconds, identify key success or problems.

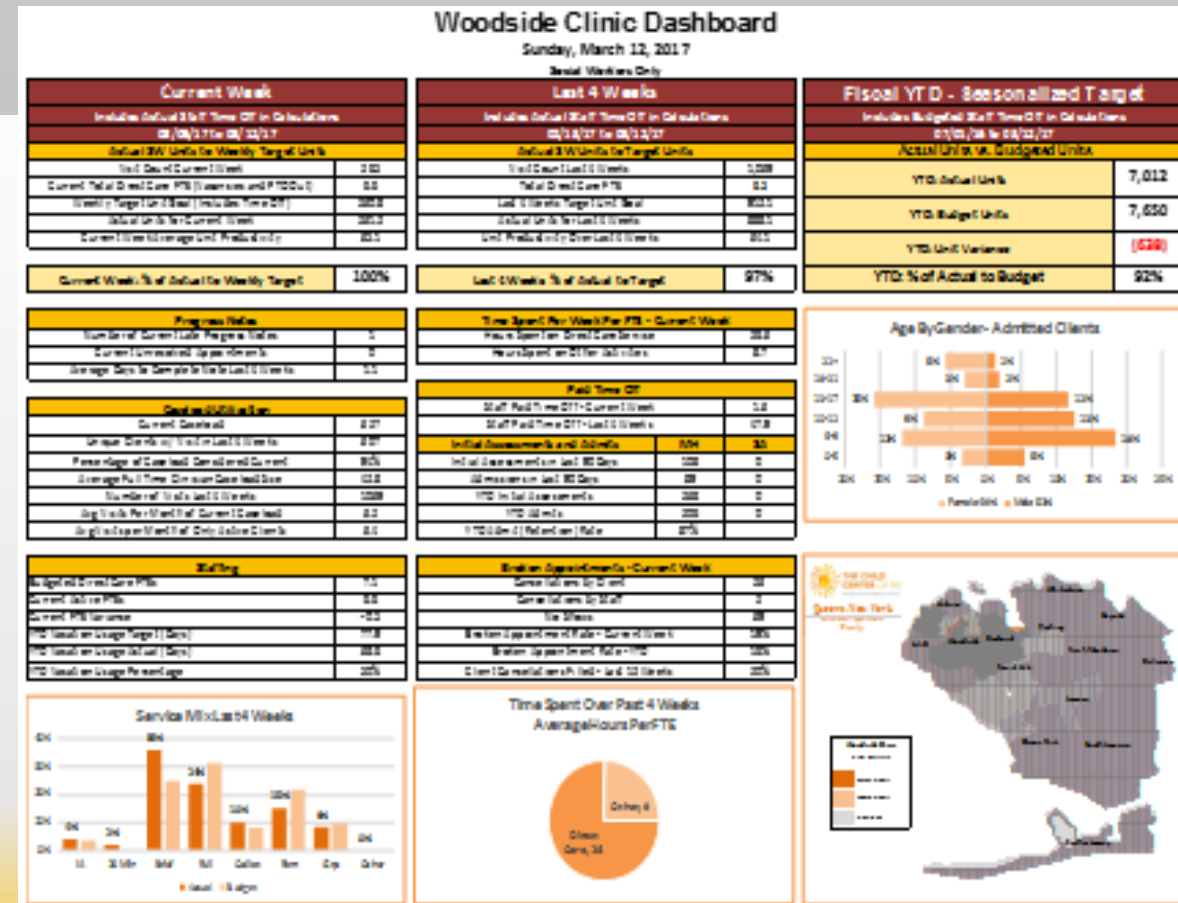


# DASHBOARD DETAILS



## 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.

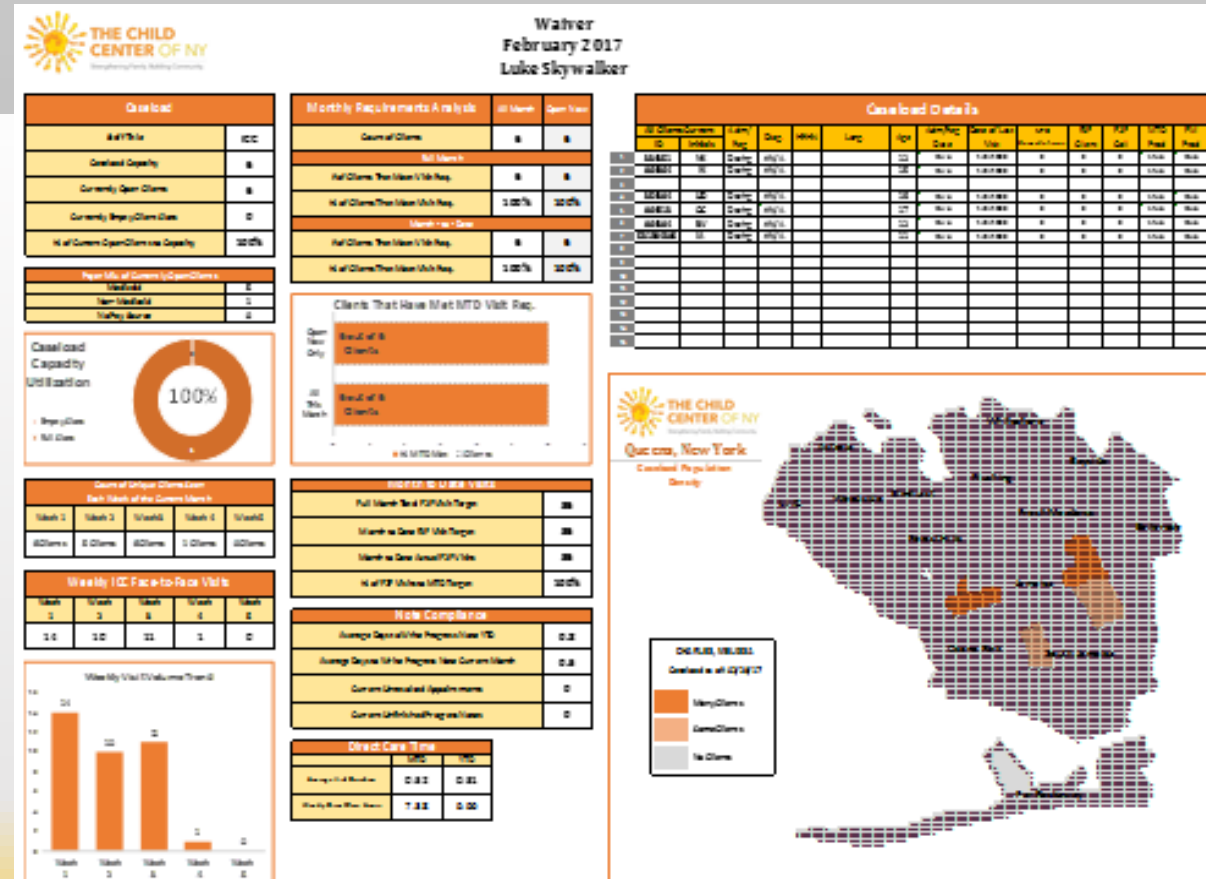
Full Time	Current Week				
	Actual vs. Goal of 35 Units/Wk PTO Factored In				
Staff Name	Hours	Wk Goal	Actual Units	Actual vs. Target	Credit Hours
Darth Vader	0	0.0	0.0	0.0%	-
Boba Fett	0	0.0	0.0	0.0%	-
Leia Organa	32	32.0	33.1	103.4%	-
Han Solo	28	28.0	27.3	97.5%	-
Luke Skywalker	35	35.0	29.7	84.9%	-
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%	-
<b>Full Time Total</b>	<b>193</b>		<b>181.7</b>	<b>94.7%</b>	<b>1</b>

# 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



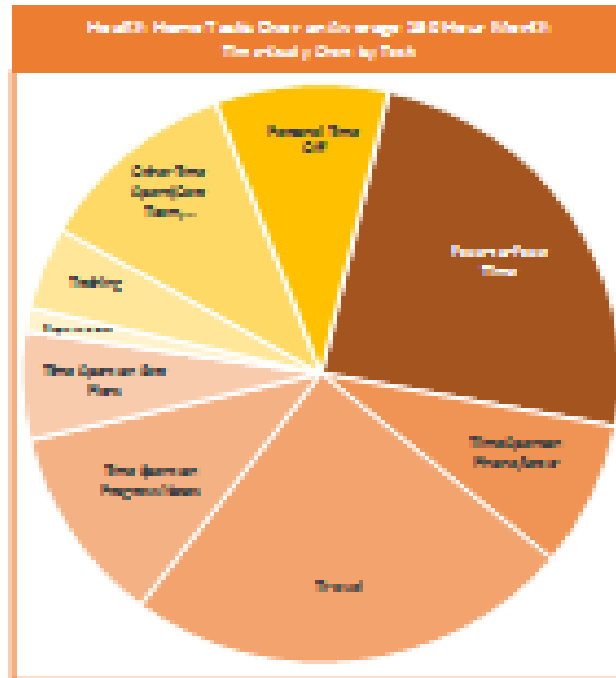
## Health Home Time Study Average Monthly Time-Spent Projection

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 Personal Time per Client	10	10	10
Average # of Care Plans per Month	1	5	1
Average # of Hours per Plan	60	60	60
Average # of Hours per Client	10	60	10
Average # of Hours per Client	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	90.0	30.0	170.0
Time Spent on Personal	50.0	100.0	30.0	180.0
Time Spent on Program Hours	10.0	20.0	30.0	60.0
Time Spent on Care Plans	60.0	300.0	60.0	420.0
Time Spent on Support/Plan	10.0	60.0	10.0	80.0
Time Spent Training	10.0	30.0	30.0	70.0
Other Time Spent (Personal/Travel)	10.0	10.0	10.0	30.0
Personal Time OIT	-	-	-	0.0
<b>Total Time Spent (Hours)</b>	<b>210.0</b>	<b>610.0</b>	<b>270.0</b>	<b>1,090.0</b>



## 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.

# PROGRAM DESIGN USING DATA



## Budget Projections

**THE CHILD CENTER OF NY**  
Improving the lives of children and families

### Health Home Program

Annual Budget Projection

Revenue Source	2018	2019	2020	2021	2022	2023	2024	2025
<b>Revenue - Annual</b>								
Legacy/Case Revenue	\$275,000	\$775,000	\$875,000	\$875,000	\$875,000	\$875,000	\$875,000	\$875,000
High Acuity Revenue	\$200,000	\$100,000	\$75,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Medium Acuity Revenue	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Low Acuity Revenue	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Annual Acuity Revenue	\$275,000	\$875,000	\$1,125,000	\$1,125,000	\$1,125,000	\$1,125,000	\$1,125,000	\$1,125,000
Healthy/Non-acuity Revenue (Minus Deductible)	\$750,000	\$800,000	\$1,125,000	\$1,125,000	\$1,125,000	\$1,125,000	\$1,125,000	\$1,125,000
Government/Insurance Revenue	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Other Revenue	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
<b>Total Annual Revenue</b>	\$1,465,000	\$2,215,000	\$2,525,000	\$2,325,000	\$2,325,000	\$2,325,000	\$2,325,000	\$2,325,000
<b>Expenses - Annual</b>								
Staffing (Admin Salaries)	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Staffing (Admin) (Full-Time Only)	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Insurance for Full-Time	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
OTPA	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Salaries (Full-Time Only)	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
<b>Total Annual Expenses</b>	\$200,000	\$800,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
<b>Staffing Levels</b>								
Full-Time FTE of Resource Coordinators	6.0	7.0	8.0	10.7	10.0	10.0	10.0	10.0

**Case Mix Data**

Acuity Level	Case Ratio
High Acuity	4.2
Medium Acuity	12.8
Low Acuity	11.8
<b>Overall Case</b>	<b>13.9</b>

**Other Metrics**

Salary	\$40,000
Bus. Insurance	\$4,000
<b>Bus. Annual Compensation</b>	<b>\$44,000</b>

When designing the structure of a program, having an interactive analytical tool that allows management to experiment with staffing patterns, caseload sizes, salaries, etc. is crucial to ensuring that a new program is fiscally viable and scalable.

# 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%	\$152,231	1.4 Months Billed
Leia Organa	11	\$3,526,483	\$2,057,115	\$2,098,257	102%	\$426,811	3 Months Billed
Luke Skywalker	13	\$12,563,598	\$7,328,766	\$6,302,738	86%	\$448,518	1 Month Billed
Padme Amidala	12	\$11,570,941	\$6,749,715	\$4,387,315	65%	\$183,253	7 Months Billed
Obi-Wan Kenobi	12	\$7,562,351	\$4,411,371	\$4,234,917	96%	\$843,488	4 Months Billed
Boba Fett	9	\$4,166,951	\$2,430,721	\$2,552,257	105%	\$843,241	3 Months Billed

Highest Revenue Accruals: FY17 YTD Through January 2017								
Rank	Account	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	\$182,274	2.5
2	\$252,414	VDD	18	Orch Star	Kyle Eric	Leia Organa	\$75,843	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	\$57,819	2.4
4	\$116,281	VDD	114	Milestones	Ray Padellaro	Obi-Wan Kenobi	\$38,281	4.8
5	\$104,188	VDD	116	Drugs	Chaukanez	Boba Fett	\$42,656	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	\$51,933	5.3
8	\$102,254	VDD	118	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