

**RA Retreat - Issues
Springmaid
February 19, 2007**

- **Welcome & Introductions**
- **Icebreaker** - take a few minutes

Nicknames - index card, pen

- Think of a nickname – one you
 - Have Had*
 - Now Have*
 - Would Like to Have*
- Write, collect & guess

Overview of Session

****Review old issues, identify news issues, future issues, prioritize, BREAK, review, action steps and assign responsibility***

[Barriers, gaps, duplication, improve the process, needs future issues]

1. Review **“old”** issues identified at Hickory Knob in 2004
2. Identify **“new”** issues

Categories:

- Personnel**
- IT**
- PHSIS**
- Business Management**
- Financial Management**
- PH Preparedness**
- Planning /Quality Management**
- Others?**

3. Identify “future” issues

BREAK– 5 Stickers- place on your priorities on the flip chart

After BREAK –review top five, add any others

List Action Steps

Assign Responsibility

**Springmaid Retreat
Brainstorming Session
February 20, 2007**

Office of Personnel Services

- Develop written policies.
- Identify/expand PAIS capabilities.
- Expand agency recruiting efforts.
 - Handle at Chief of Staff level.
 - Present a consistent message.
 - Look at options.
 - Target efforts.
 - Consider summer help.
 - Expand internships with universities, nursing schools, regional campuses and technical schools.
 - Utilize the legislative budget committees to expand internships or increase recruitment funding.
 - Explore utilizing Internet.
 - Utilize the OHR Website.
- A RIF should be able to be considered to offer staffing options for regions.
- HS Human Resources should be placed under the umbrella of the Chief of Staff, Office of Personnel Services.
 - There is a disconnect, confusion, lack of coordination and consistency and because of employee relations and legal issues.
- Improve PAIS/Budget Master problems.

Public Health Statistics and Information Systems

- The Regional Administrators would like some of the Vital Records fees collected to be returned to the regions.
- New systems for births and deaths are in place.
- Other Issues:
 - Staff turnover
 - Customer waiting times
 - Services provided are inconsistent
- Major Focus:
 - Improve customer service
 - Security issues
 - Develop and implement a centralized certification and training program for DCR's.

Bureau of Information Services

- Get all accounts receivable together.
- Eliminate the chart of accounts, keep AIMS.
- Security issues, e.g. passwords, breaches, single “sign-on” (will take 3-5 years)
- Develop drills/exercise for disaster preparedness.
- Can CARES be manipulated to serve as an electronic medical record?
- Pursue the development of an electronic medical record
- Merge Home Health System and CRS into the electronic medical record.
- Identify training needs for IRC’s and establish competencies to be included in training.

Planning

- Assist with setting up operational plans.
- Consider pulling together information/reports for the legislature in one central location.
 - For information and reports
 - Develop a database
 - Other reports
 - Put on share with limited access
- Project Management
 - Establish standards and protocols

Quality Management

- Need a comprehensive list of training options

Office of Financial Management

Issues:

- Payroll
- Budget Master
- Turnover (TERI)
- SAP/SCEIUS – modules to be added:
 - Purchasing
 - Accounts Receivable
 - Grant costing
- Continue to develop and refine policies and procedures.

Business Management

Issues:

- Pharmacy pricing (product prices float- national problem)
- QS1 software for tracking pharmaceutical inventory – HS developing
- Inventory control
- Space needs
- Facility management
 - State budget issues
 - County budget issue
 - Consider 10-year space planning
- Protests in procurement are increasing.
 - Review new e-mail policy.
 - Retain documentation in a file
- New computers are being purchased with VISTA preloaded
- PHISIS – revamping customer service area. An alternate space for VR staff and customers during remodeling phase will need to be identified.
- Develop an Administrative Support staff “101 training” for new hires or promotions.
- A building for receiving and storage of antivirals is to be built in three phases. Currently, the pharmaceuticals are being stored at the Lab.

Public Health Preparedness

- Equipment purchases utilizing BT funds must be assigned to staff funded from BT funds.
- Items purchased with BT funds must to be reviewed.
- Future funding uncertainties are anticipated.

Other Issues

- Review products and services.
- Need data on cost/results, cost vs. benefit or return on investment (ROI)
- Revenue streams (federal, state) continuing to shrink. Match is being required in some cases.
- The agency needs to be accountable for what has been achieved with the resources given to us (appropriations).
- Consider a “semi-annual” review of Informatics Committee scope of work, projects, etc. and share with agency staff.
- AIMS Team- a work in progress
 - Identify agency procedures.
 - Identify what can be done better.
 - Determine how we collect, transfer and maintain organizational and employee knowledge.
- PCAS codes
 - Tracking thru CBARS

- WIC
- Immunization
- FP module
- Tie PCAS and payroll. Feed from PAIS.
- Improve PCAS reports.
- Budget Master
 - a) Bob Arndt checking on PAIS compatibility
 - b) Eliminate budget dual systems.
- Review agency services.
 - Reduce numbers/types of services.
 - Eliminate some services.
- Look at emergency staffing issues for pan flu, hurricanes, and other emergency situations.
 - Need flexibility
 - Lack of nursing staff for shelters

**Top Priorities
Springmaid Retreat
February 20, 2007**

1. Health Services Personnel should be brought back into the Office of Personnel Services under the Chief of Staff– Doug Calvert.
2. Resolve some of the PAIS and Budget Master issues – Mary Fuhrman, Mary Bannister, Ronnie Belleggia, Gwen Manning and other staff.
3. Develop an electronic medical record system for the agency – Bob Arndt & Company, Tricia Baker.
4. Identify services that need to be reduced or eliminated. Consider cost/benefit, ROI, identify what we do, what we are mandated to do and process improvement – Mary Fuhrman, Darbi MacPhail, Patty Dod Lolas and other staff.
5. Establish a facility management system to identify immediate need, need, and future need facilities and develop criteria, standards and definitions – Tony Lolas and Business Management staff.
6. Review the Vital Records fee system and consider sharing fees with the regions- Guang Zhao and Luanne Miles.

Administrative Manual Format

- Bureau/Office Overview (brief ½ - 1 page)
- Responsibilities of the Regional Administrators (bullet)
- Summarize the major issues from your area that impact the Regional Administrators
- Report Table – to include report name, format, frequency, to whom (who, what, when, how)
- References
 - Policy Manual
 - Procedure Manual
 - Intranet
 - Other
- Identify Required Training (bullet)
- Include an Organizational Chart with contact information

Notes from Meeting with Mentor January 10, 2007

Questions for the Chief of Staff

1. Doug- goal statement for this project, what do you want to accomplish???
Improve standardization and consistency, best practices for management
2. Format

Questions for the RA's/Administration

1. What would you like to have known and in what order would you have liked to have know this information.
2. What do you see that is being done that could be eliminated, consolidated or altered?
3. What are your greatest administrative challenges?
4. What does Administration need to be doing? Bureau perspective vs. regional perspective
5. What do you want to know about the regions or about central administration (challenges, programs, functions????)

Suggestions:

1. Meet with several RA's. Listen to their thoughts and perspectives (info = confidential)
2. Assign a mentor to new RA's.
3. Consider what Bob Arndt does with new IRC's. Let New RA's spend 2 weeks with Central office Administration and/or HS Operations
4. Orientation
5. Expectations/rules
6. What should be done routinely?
7. Who should be reviewing...other staff, how often?
8. How should this be information be communicated and with whom?

Summary of Site Visits with Regional Administrators (RA)

- Training
 - Identify essential training needed
 - Prioritize (e.g. Year 1, Year 2, etc)
 - Develop a solid process
 - Essential/critical knowledge
 - What is the role of the RA
- Consider developing a formal orientation
 - Agency
 - Regional
- Site Visits
 - Columbia
 - CO Administration (bureau staff)
 - HS Operations
 - Visit several regions (spend a day with a RA-shadowing)
- Mentor with experienced RA
 - Schedule topics to discuss (budget, salaries, communication with staff, etc)
 - Schedule regular face-to-face meetings
- Understanding budget management and fiscal management are critical
 - Earnings
 - Revenue and Expenditure Analysis
 - Medicaid
 - Budget 101
 - Different funding sources (state, federal, etc.)
 - AIMS
 - Procurement (basic knowledge DPO Training and certification)
 - Salary structure
 - Financial updates/reports to staff
- Working with staff
 - Meet with Regional Health Director
 - Meet with the Region Management Team
 - Learn the areas of responsibility of each member of the team (job shadow, if possible- do a septic tank inspection, spend time in the WIC office, etc)
 - How/what to communicate to the Regional Health Director, management staff, other staff
 - Understand personnel management/workforce development

- The Region
 - Demographics
 - Culture
 - Formal and informal leaders
 - Critical health status indicators
 - Resources
 - Communities
 - Local politics
 - Available services
 - Partnerships

- Critical qualities in a RA
 - Skills, knowledge, experience, education
 - Competencies
 - Budget management
 - Fiscal management
 - Personnel management
 - Planning and policy
 - Procurement
 - Information resource management
 - Business management
 - Vital records
 - Disaster preparedness
 - Other duties

- Suggestions for the manual
 - Executive Summary at each chapter
 - Spreadsheet to include what is due, to who and when
 - Build in an accountability system

RA Meeting
October 24, 2007
Manual Discussion Agenda

- I. Status of the Manual: Where Are We?
 - A. Progress to Date
 - B. What is Different in Draft #2?
 - C. What is Missing?
 - PH Preparedness
 - Health Services Operations
 - You Tell Me
 - C. Mary's Supervisor's Manual
 - D. Title – Do We Like It?

- II. Summary: Site Visits with RA's (handout)

- III. Pilot Test with New RAs (Charles Long)
 - A. Central Office Site Orientation
 - B. Job Shadowing
 - C. Other Thoughts

- IV. Next Steps
 - A. RA Committee (to develop spread sheet & to review materials)
 - How should it work?
 - Who wants to volunteer?
 - B. Web-Based Component

- V. Concerns/Suggestions for Improvement