

Abstract : Oral Presentation

Title: MAY THE ROAD RISE UP TO MEET YOU: LESSONS LEARNED USING THE BALANCED SCORECARD IN A MENTAL HEALTH FACILITY

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Objective: To share information gained in measuring effectiveness and outcomes through the process of implementing a Balanced Scorecard at Hudson River Psychiatric Center in New York. This presentation will describe the process used to develop the Scorecard, the results achieved and the strengths and weaknesses identified. Lastly, the authors will discuss changes made as a result of lessons learned.

Methods : A Balanced Scorecard of 20 measures of performance in four interrelated perspectives was developed as a means to measure and manage the success of the organization's strategic plan. The Scorecard contained external measures (benchmarks), internal measures (control limits) and clinical outcomes measures. Data from these measures were used to prioritize Performance Improvement activities. Scoring was initially capped in areas that represented new initiatives or employed new measurement tools to allow a phase in period.

Results: An overall improvement of 10% was seen after the first six quarters of Scorecard measurement. The Financial Perspective area saw a 13% improvement, the Customer Perspective area gained 5%, the Internal Business area a gain of 15% and the Innovation and Learning area 9% improvement. For the seventh quarter all caps were removed. While there has been variability in the results, the overall trend is toward continued improvement.

Performance Improvement Projects linked to the Scorecard were in the areas of:

- Compliance With Mandatory Staff Training - Increased to 97% while reducing by 55% the number of classes scheduled
- Restraint Usage - Decreased by 32% within the first six months
- Outpatient Satisfaction With Programs - Increased by 11% overall; resulted in the addition of one new program and increased utilization of two existing programs
- Clinical Outcomes of Inpatients - 16% improvement on the PANSS by patients receiving Risperidone and 11% improvement on the PANSS by patients receiving Olanzapine
- Clinical Outcomes of Outpatients - Improvements reported in symptoms and functioning on all sub-scales of the BASIS-32
- Fiscal Education of Stakeholders - 13% increase in knowledge of financial resources
- Treatment and Program Planning - Increased compliance with Program Review criteria from 72% to 89%
- Automation of Medical Records - 1800 Medical Records automated yielding improved treatment plans and legibility

Conclusions: The Scorecard has proven to be an effective tool in focusing the organization on achieving goals and objectives. The measures are sensitive and provide an accurate picture of organizational strengths and weaknesses. The Scorecard emphasizes the importance of using both internal and external measures of performance and is effective in identifying areas in need of Performance Improvement. The authors also concluded that the first version of the Scorecard contained too many indicators (44), some of which were measured too infrequently (18) and an excess of satisfaction indicators (20). The outcomes from the Performance Improvement activities linked to the Scorecard represented significant improvements and in some cases cost savings. The importance of structuring improvement activities to better quantify results, cost savings and value added became evident

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Supporting information:

Ms. Wolfersteig, the Director for Quality Management and Facility Administration at Hudson River Psychiatric Center in Poughkeepsie, New York, has twenty-seven years of experience in Public Sector Mental Health in New York State. Ms. Dunham, the Director for Risk Management and Standards Compliance, has twenty-five years of experience in Public Sector Mental Health in New York State.

Ms. Wolfersteig and Ms. Dunham co-authored "Performance improvement: a multidimensional model", which was published in the *International Journal for Quality in Health Care*, 1998; **Volume 10, Number 4**, Harvard School of Public Health, Boston, Massachusetts.

They have also co-authored poster presentations on this subject as follows:

Wolfersteig, J., Dunham, S. (1999). "The Balanced Scorecard and Performance Improvement". Poster presentation at the 16th International Conference on Quality in Health Care. October 1999. Melbourne, Australia.

Wolfersteig, J., Dunham, S. (1997). "Balanced Scorecard Development in a Public Behavioral Health Care Organization". Poster presentation, International Congress on Performance Measurement and Improvement in Health Care, November 1997, Chicago, Illinois.