



Lake Shore Hospital Authority Strategic Plan

2013-2016



Introduction

The Lake Shore Hospital Authority (LSHA) oversees maintenance and operation of Shands Lake Shore Regional Medical Center in Lake City, Florida. The LSHA has responsibility for ensuring that the hospital provides medical care options to residents of the region and providing assistance to the indigent. The Hospital Authority serves a region with a growing population and a dynamic economy. Thus, the Hospital Authority must be proactive in anticipating and preparing for the changing medical needs of the region. There is the recognition that the hospital must grow and develop in order to meet the changing medical needs of the community. The Hospital Authority also acknowledges and embraces the role it plays in the betterment of the community. It is only through thoughtful, well-conceived actions that the hospital authority will fulfill its mission and achieve its vision. These steps are articulated in a strategic plan for hospital maintenance and development. This document presents the Hospital Authority's strategic plan, describes its development, and outlines strategies to be employed in plan implementation.

Background

The LSHA is an independent special district created by the Florida Legislature to provide hospital facilities to the county. The authority is administered by a seven member board of county citizens and residents who are appointed by the Governor. One of the members is a physician who practices at Shands Lake Shore Regional Medical Center. The purpose of the authority is to acquire, construct, improve, enlarge, repair, equip, operate and maintain hospital facilities in the county. The Authority was created to ensure that residents of the region have access to quality healthcare options. The Authority also has responsibility for furnishing temporary relief to the county indigent and assistance in their rehabilitation.

The legislation creating the Hospital Authority provided it with the power to levy a tax on taxable property in Columbia County to acquire the funds to support maintenance, operation, and development of the hospital. The ability to levy a tax brings with it the need for fiscal responsibility, a responsibility the hospital authority takes seriously. The need for fiscal responsibility and accountability influences actions taken by the authority and its plans for the future. The authority also takes steps to include mechanisms for maintaining accountability in the use of public funds and the actions it takes.

Historically, to facilitate operations of the hospital and delivery of services, the Hospital Authority entered into a collaborative relationship with Shands Healthcare, a private not-for-profit corporation affiliated with the University of Florida (UF) Health Science Center. The relationship allowed the Hospital Authority to augment services through utilization of the resources of the Shands Hospital Network and the UF Health Science Center. Many actions taken by the Hospital Authority were geared to creating a hospital environment that would facilitate Shands Healthcare, Inc. efforts to optimize its services to people it serves.

Currently, Shands Healthcare (now known as UF Health) has entered into agreements with Health Management Associates, Inc. (HMA) to operate UF Health’s rural hospitals. HMA is a premier operator of acute care hospitals primarily in the southeast and southwest areas of non-urban America. As such, the LSHA now partners with the Shands/HMA affiliation through a long-term collaborative partnership lease agreement for Lake Shore Hospital, which is now known as Shands Lake Shore Regional Medical Center.

Overview of the Process to Create the 2013-16 Strategic Plan Update

Multiple methods were utilized in order to gain a fresh perspective from the LSHA Board of Trustees, staff and hospital administrator for the purpose of updating the Strategic Plan for 2013-2016. The following summarizes the input from these methods.

Surveys

As part of the process, Trustees were asked to score the Goals and Objectives in the 2007-12 Strategic Plan for relevancy. The 2007-12 Strategic Plan had six major goal areas. Table 1 shows the relevancy scores based on the survey administered to the Trustees and the Executive Director of the LSHA. Survey participants were asked to rate the relevancy of each goal on a scale of 1 to 5 with a “1” representing lowest relevancy and a “5” representing the highest relevancy.

Table 1. Current Strategic Planning Goals and Relevancy Score from LSHA Board Survey.

2007-2012 Goal	Current Relevancy Score
<u>Goal 1 (Financial Stewardship):</u> Exhibit fiscal responsibility in the assessment and management of hospital funds and resources	5.00
<u>Goal 6 (Community Awareness):</u> Collaborate with Shands Health Care to achieve recognition as a regional source for high quality, comprehensive medical services	4.40
<u>Goal 5 (Community Enhancement):</u> Actively contribute to community enhancement and regional development	4.20
<u>Goal 2 (Growth and Development):</u> Increase the capacity of the hospital to expand and enhance services through property acquisitions and development	3.80
<u>Goal 3 (Facilities Expansion):</u> Increase the capacity of the hospital to expand and enhance its medical options through strategic building construction	3.60

Table 1. Current Strategic Planning Goals and Relevancy Score from LSHA Board Survey.

2007-2012 Goal	Current Relevancy Score
<i>Goal 4 (Facilities Enhancement):</i> Create an environment for expansion and enhancement of medical services through renovation of existing hospital structures	2.80

Trustees and the Executive Director were also asked to rate the relevancy of each of the objectives within each of the goal areas. These results are shown in Table 2.

The purpose of the questions regarding relevancy was to determine the current importance and relevance of the goals and objectives in the 2007-12 Strategic Plan. During preliminary discussion of the strategic planning process, Board of Trustees members and the Executive Director indicated that in general the existing goals were still relevant, but some were much more relevant than others given the nature of the relatively new relationship with Shands/HMA.

Interviews

Each member of the Board of Trustees and the Executive Director of the LSHA as well as the Administrator of the Shands Lake Shore Regional Medical Center also was given a one-on-one interview to ask them questions regarding but not limited to the following:

- Mission, Long-Term Goals and Vision;
- Perceptions of critical issues;
- Trends, factors and forces that could affect the Hospital and the Authority;
- Opportunities and threats to the Hospital and the Authority;
- Individual perspective on what the Goals and Objectives should be for the LSHA

These are some of the key themes that occurred frequently during the individual discussion with Trustees, the Executive Director of the LSHA and the Administrator of the hospital:

1. The LSHA has evolved into more of a landlord-tenant relationship with Shands Lake Shore Regional Medical Center and now many of the traditional facility enhancement, maintenance and operations issues that were more of a focus of the LSHA are now less of a day-to-day focus of LSHA as defined in the lease agreement with the hospital.
2. While perception issues are important to the hospital, as a for-profit institution, they should be purview of the hospital and addressed as part of its business and competitive strategies.
3. Community awareness of the LSHA is important with regards to maximizing the public’s knowledge (especially among the target population) of the availability of indigent care services and the value, effectiveness and efficiency of services secured by the LSHA through the stewardship of taxpayer resources. Thus,

“marketing” in these areas is the responsibility of the LSHA while marketing of the overall hospital is the responsibility of Shands Lake Shore Regional Medical Center.

4. We need enhanced reporting to measure and monitor the progress and performance of our investments in indigent and underserved healthcare both to further inform Board member decision-making and to effectively communicate value to taxpayers.
5. Initial Board orientation as to the purpose of the LSHA as well as the role and responsibilities of the Board members is essential.
6. While acquiring additional land and property, at least in the short-term, appears to be less of a priority, a physical plan for utilizing/developing current physical holdings is required. In addition, the Board should develop a list of priorities or criteria that would help to determine if and when additional physical properties should or would be purchased.
7. Enhanced or expanded partnerships may be required to provide more efficient and effective indigent healthcare service especially those focusing on preventive care and education; developing primary care homes; and provision of specialty and sub-specialty care.
8. As Obamacare, health reform, Medicaid reform, etc. continue to evolve the LSHA may want to prepare some scenario planning for the future of how the LSHA may look and operate (or perhaps may not even operate) in order to be prepared for multiple contingencies.
9. As the nature of the relationship between the LSHA and Shands Lake Shore Regional Medical Center (Shands/HMA) continues to evolve, the LSHA may want to prepare some scenario or contingency planning for scenarios such as maintaining long-term lease, selling of facility outright and re-location of facility in order to be prepared for multiple contingencies.
10. The LSHA and Shands/HMA may need to work a little closer on joint strategic planning issues that will affect the provision of indigent care to Columbia County residents at the hospital and throughout the community (noting that there will be limitations to community discussions of proprietary business strategies of the for-profit hospital).
11. Ongoing development of indigent healthcare services and partnerships should be based on the healthcare needs of the indigent and underserved residents of Columbia County.
12. Everything that LSHA does should be able to be tied back directly to the provision of healthcare for the indigent and the underserved, to the extent it is mandated by enabling legislation.

The purpose of these surveys and individual discussions was to both revisit the Mission, Long-Term Goals and Vision and update if necessary and to find the common ground and common themes that would comprise the updated 2013-16 LSHA Strategic Plan Goals and Objectives.

Table 2. 2007-2012 Strategic Plan Goals and Objectives and Current Relevancy Score from LSHA Board Survey.

Goals and Objectives	Score
<i>Goal 1. Exhibit fiscal responsibility in the assessment and management of hospital funds and resources</i>	5.00
1.1. Implement procedures for monitoring and assessing the health care needs of regional residents	4.40
1.2. Accurately assess the financial needs of the hospital and adjust the millage rate accordingly	4.40
1.3. Implement procedures for assessing and responding to maintenance needs of the hospital	2.40
1.4. Develop annual and 3-year budgets to meet the funding needs for indigent medical care and capital and service improvements.	4.20
1.5. Implement procedures for assessing the effectiveness of budget allocations and fund expenditures	4.20
1.6. Maintain accountability by confirming the appropriateness of fund usage	4.20
1.7. Generate supplemental funds through property leasing and collaborative medical initiatives	4.20
<i>Goal 2. Increase the capacity of the hospital to expand and enhance services through property acquisitions and development</i>	3.80
2.1. Acquire local properties needed to expand and enhance the hospital complex	2.00
2.2. Incorporate acquired structures into the hospital complex through renovation and/or elimination	3.40
2.3. Improve the appearance of the hospital complex through strategic development of hospital properties	3.60
2.4. Generate supplemental revenue sources through development and leasing of hospital properties	4.40
<i>Goal 3. Increase the capacity of the hospital to expand and enhance its medical options through strategic building construction</i>	3.60
3.1. Develop and implement a Master Facilities Plan that addresses anticipated facility renovation needs and addition of new facilities	3.20
3.2. Design and construct a new hospital wing to create a new entrance to the hospital and house expanded medical services*	2.40
3.3. Design and construct a building to house primary care practitioners and diverse medical services*	3.40
3.4. Design and construct a parking facility that serves hospital and community needs	4.00
<i>Goal 4. Create an environment for expansion and enhancement of medical services through renovation of existing hospital structures</i>	2.80
4.1. Maintain the quality of existing hospital structures through ongoing maintenance and repair	2.60
4.2. Design and develop a highly visible and appealing entryway to the hospital complex*	2.80

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Goals and Objectives	Score
4.3. Improve the appearance of the hospital complex through landscape development and enhancement	2.80
4.4. Make the structural changes to the hospital that allow for improvement of operations and quality of services*	2.80
4.5. Make the structural changes to the main building to accommodate the addition of new medical equipment and services*	2.60
4.6. Renovate an acquired building to serve as the location for processing and storing patient medical records	1.60
4.7. Renovate an acquired building to serve as the location for hospital administrative offices*	1.60
<i>Goal 5. Actively contribute to community enhancement and regional development</i>	4.20
5.1. Implement procedures for assessing and responding to medical needs of the community	4.40
5.2. Provide diverse, affordable medical services to all members of the community	3.40
5.3. Provide high quality medical services to the indigent population of Columbia County	4.40
5.4. Develop collaborative relationships with community medical providers to increase the diversity of medical options for patients	3.40
5.5. Provide support for the recruitment and retention of primary care physicians	3.40
<i>Goal 6. Collaborate with Shands Health Care to achieve recognition as a regional source for high quality, comprehensive medical services</i>	4.40
6.1. Ensure familiarity with Shands Healthcare procedures for assessing how the hospital is perceived by patients and community members	4.40
6.2. Serve as community ambassadors to increase awareness of the hospital's service options and community contributions	4.20
6.3. Actively participate in the Downtown and Neighborhood Development Committee	4.40
6.4. Participate in the 100 year hospital anniversary celebration to increase community awareness of its contributions to the community	2.80

* This objective is contingent on its inclusion in the Facilities Master Plan addressed in Objective 3.1

Updated Mission, Long-Term Goals, and Vision

While the Mission, Long-Term Goals and Vision did not change substantially, each of them were tweaked slightly to account for concerns voiced during the interview process and the Board of Trustees Strategic Planning Workshops, of which two were held.

Though the mission of the Lake Shore Hospital Authority (LSHA or Authority) is primarily determined by state legislative mandate, it also reflects the collective perceptions of the trustees. The mission statement of the Authority is presented below:

To provide quality healthcare services for all Columbia County residents, with a special emphasis on the underserved, through Shands Lake Shore Regional Medical Center and partnering clinics.

This mission statement captures the purpose of the Authority and describes what the Authority seeks to accomplish on a daily basis. To further define this mission, the Authority has adopted a set of long-term goals that guides its efforts. These goals are presented below:

1. *To serve as responsible stewards of public funding in providing for medical needs of Columbia County.*
2. *To develop and maintain a hospital complex that supports a full array of high quality medical services.*
3. *To provide affordable, high quality medical services to residents of Columbia County.*
4. *To meet the medical needs of indigent residents throughout Columbia County.*
5. *To be a positive presence in, and contributor to, the downtown area of Lake City.*

Though the mission statement defines the purpose of the Hospital Authority and the long-term goals provide a direction for its efforts, they do not convey the trustees' vision for the hospital. This vision delineates what the hospital needs to become to continue fulfilling its mission and achieve the long-term goals. The trustees' vision for the hospital is described below:

Lake Shore Hospital will be a highly visible and positive component of central Lake City. The hospital will provide a broad array of high quality medical services that address the diverse medical needs of residents of Columbia County. The hospital will be a dynamic institution that grows and evolves to meet the ever-changing medical needs of the community. Though the hospital will maintain its commitment to meeting the medical needs of the underserved in the community, it will provide a high quality medical experience that appeals to all residents of Columbia County and will be viewed as a regional leader in healthcare. The hospital will maintain its financial solvency by responsibly utilizing public funds and supplementing those funds with ancillary financial resources. The quality of the facilities and medical services will combine to produce a consistently positive medical experience for all patients, making Shands Lake Shore Regional Medical Center the medical provider of choice in Columbia County and throughout the region.

Recommended Strategies and Objectives for the 2013-16 LSHA Strategic Plan

Table 3 details the recommended Goals and Objectives for 2013-2016 LSHA Strategic Plan update. These recommendations reflect the areas of greatest common agreement, obtained during surveys, interviews and workshops, regarding the strategic direction of the LSHA.

While the 2007-12 plan had six major goal areas, as seen in Table 3, the 2013-16 LSHA Strategic Plan has four major goal areas. These are:

- Financial Stewardship
- Community Awareness
- Community Enhancement
- Growth, Development and Expansion

The six goal areas in the 2007-12 plan were consolidated into four areas for primarily two reasons. First, the new arrangement between the LSAH and Shands/HMA as expressed in the lease, while preserving the monitoring and ensuring role of the LSHA, compels Shands/HMA to take the lead on many of the strategies that were in the 2007-12 plan as part of their ongoing lease requirements. Second, there was an element of redundancy in some of the goal areas in the 2007-12 strategic plan.

While many of the same elements are incorporated in the 2013-16 LSHA Strategic Plan that were incorporated in the 2007-12 plan, the focus and context of many of the goals and objectives have changed to reflect the new and evolving partnership with Shands/HMA.

Table 3. Recommended Goals and Objectives for 2013-2016 LSHA Strategic Plan.

Financial Stewardship Goal	
1.	<i>Exhibit fiscal responsibility in the assessment and management of LSHA taxing district funds and resources</i>
1.1.	Implement procedures for monitoring and assessing the healthcare needs of the residents of Columbia County, including the underserved
1.2.	Accurately assess the financial needs of the hospital and LSHA healthcare programs and adjust the millage rate accordingly
1.3.	Develop annual budget to meet the funding needs for the hospital and LSHA healthcare programs
1.4.	Continue to enhance procedures for assessing the effectiveness of budget allocations and fund expenditures
1.5.	Develop and Implement procedures for assessing compliance with terms of lease by Shands/HMA
1.6.	Maintain accountability by confirming the appropriateness of fund usage
1.7.	Generate supplemental revenue sources through property leasing and collaborative medical initiatives
Community Awareness Goal	
2.	<i>Collaborate with community partners to achieve recognition that the LSHA is the major source for high quality, comprehensive medical services for all residents of Columbia County, including the underserved</i>
2.1.	Develop marketing and outreach campaigns to inform eligible Columbia County residents of the full scope of healthcare services available to them through the LSHA
2.2.	Develop community education campaign that informs the general public and taxpayers in Columbia County of the value, effectiveness and efficiency of healthcare services that are coordinated by the LSHA
2.3.	Collaborate with community partners to inform and educate the public on the most pressing healthcare needs of the indigent and the underserved of Columbia County and the impact of these needs on the community as a whole
2.4.	Collaborate with Shands/HMA to achieve recognition for the hospital as a regional source for high quality, comprehensive medical services
2.5.	Ensure familiarity with Shands/HMA procedures for assessing how the hospital is perceived by patients and community members
2.6.	Serve as community ambassadors to increase the awareness of the hospital’s service options and community contributions
Community Enhancement Goal	
3.	<i>Actively contribute to community enhancement and development</i>
3.1.	Implement procedures for assessing and responding to the medical needs of the community
3.2.	Provide diverse, affordable and quality medical services to all residents of Columbia County
3.3.	Provide high quality medical services to the indigent and underserved population of Columbia County

Table 3. Recommended Goals and Objectives for 2013-2016 LSHA Strategic Plan.

3.4. Develop collaborative relationships with community medical providers and agencies to increase the diversity of medical options for patients
3.5. Support efforts for the recruitment and retention of primary care providers and other critically-needed specialists
3.6. Actively participate in downtown and community development efforts
Growth, Development and Expansion Goal
<i>4. Increase the capacity of the hospital and LSHA to expand and enhance services and medical options</i>
4.1. Develop a physical plan for developing or utilizing all existing LSHA physical acquisitions (in possession of the LSHA at the time of adoption of the 2013-16 Strategic Plan)
4.2. Conduct regular and ongoing scenario planning or environmental scanning of various contingencies such as the effects of Obamacare, health reform, Medicaid reform, continued leasing, hospital sale and hospital relocation and the impact these decisions would have on the future of the LSHA (to aid in strategic decision-making)
4.3. Develop decision criteria for acquisition and dispensation of physical assets/property
4.4. Assess the need to acquire local properties to expand and enhance the hospital complex
4.5. Work with Shands/HMA to develop, implement and maintain a Master Facilities Plan that identifies and prioritizes anticipated facility renovation needs and the addition of new facilities
4.6. Work with Shands/HMA to maintain and improve the appearance of the hospital complex
4.7. Work with Shands/HMA to maintain the quality of existing hospital structures
4.8. Partner with Shands/HMA to design and construct parking facilities that that serve hospital and community needs
4.9. Generate supplemental revenue sources through hospital and property leasing and collaborative medical initiatives
4.10. Monitor maintenance and capital needs of the hospital

Implementation and Assessment

The objectives in the strategic plan identify what needs to be accomplished to reach the goals outlined in the strategic plan. Though the objectives define what needs to be accomplished, they do not identify the specific strategies and action steps to be employed in plan implementation.

The Executive Director should work with board and staff to identify the key strategies, actions and necessary resources and partnerships required to implement the 2013-16 Strategic Plan update. Financial feasibility must be determined for all goals and objectives as well as those strategies and action steps that are identified. Some potential strategies identified during the planning process are identified in Table 4. Additional strategies will be identified and employed throughout the implementation of the plan.

The Board of Trustees should periodically revisit the strategic plan to assess its implementation, to ensure that the plan remains sound and appropriate given the current environmental scan and to confirm the adequacy of financial resources to support implementation. At a minimum, an annual assessment of the status of plan implementation would be consistent with and in keeping with the Board of Trustees' commitment to accountability. In addition, the findings or analysis of the periodic assessment will aid the Trustees in decisions regarding ongoing and future implementation of items and will also allow for adjustment of the plan to accommodate for unforeseen events, evolving opportunities or changes in priority.

Table 4. Potential Strategies to Achieve Goals and Objectives of 2013-2016 LSHA Strategic Plan.

Potential Strategies	Alignment with Goal/Objective	Status	Timeline
Develop process for ongoing community health needs assessments.	1.1; 2.3; 3.1; 4.2	Planned	TBD
Enhance or create monitoring tools and processes to assist Board in determining the effectiveness of budget allocations and fund expenditures.	1.2; 1.3; 1.4	Planned	TBD
Conduct joint strategic planning activities with Shands Lake Shore Regional Medical Center administration and Shands/HMA.	2.4; 2.5; 4.5; 4.6; 4.7; 4.8	Planned	TBD
Enhance or create efforts to market available services through LSHA to Columbia County residents.	2.1; 2.2; 2.3; 2.4; 2.5; 2.6	Planned	TBD
Conduct independent annual inspection of LSHA properties.	1.4; 1.5; 4.1; 4.3; 4.4; 4.5; 4.6; 4.7; 4.8	Planned	TBD
Conduct (periodically) independent audit of facility renovation and enhancement needs (commonly referred to as the TLC, Inc. report).	1.4; 1.5; 4.1; 4.3; 4.4; 4.5; 4.6; 4.7; 4.8	Planned	TBD
Create policies and procedures for acquiring and disposing of properties.	1.4; 4.1; 4.3; 4.4; 4.5	Planned	TBD
Enhance or create a master facilities and properties plan that provides a roadmap for and prioritizes facilities expansion, renovation and acquisition and strategies on how to best utilize or dispense with existing properties.	1.4; 1.5; 4.1; 4.3; 4.4; 4.5; 4.6; 4.7; 4.8	Planned	TBD
Enhance or create reporting to measure and monitor the progress and performance of LSHA investments in indigent and underserved healthcare bot to further inform Board member decision-making and to effectively communicate value to taxpayers.	1.2; 1.3; 1.4	Planned	TBD
Conduct scenario or contingency plans to address potential changes in the national, state and local healthcare environments.	1.2; 1.3; 1.4; 4.2	Planned	TBD