

CASE STUDY



Operation Access | Strategic Scorecard

The Project

Operation Access, a Bay Area healthcare organization, applied for a Strategic Scorecard Service Grant for guidance on measuring and tracking progress on services and strategic priorities.

The Need

Located in San Francisco, Operation Access (OA) connects medical professionals willing to donate surgical procedures with uninsured individuals in need of care. They are at a critical stage in terms of growth and organizational capacity. The number of patients served has grown continuously since the organization was founded in 1993. The staff has also grown from four to eleven over the last three years, and the number of medical volunteers to over 650. OA needed a way to organize the performance metrics they collected in order to focus their efforts on the most critical issues the organization was facing.



Due to the tremendous need for services and OA's limited resources, it was clear that the organization needed a way of organizing the data they collected in way that helped them establish clear priorities. With impending growth in workload, staff size, and budget, they needed to ensure that the data analysis systems they had in place would keep them ahead of the curve. OA reached out to the Taproot Foundation to leverage pro bono consultants' professional guidance on the wealth of data they collected for reporting and evaluation. Through the Strategic Scorecard Service Grant, OA was able to identify the right data to measure strategic progress, and understand how the organization could best compile and present that data to ensure alignment of all stakeholders.

The Work

The Taproot Foundation's team of pro bono consultants kicked off the project by interviewing all of OA's key stakeholders, including board members, key managers and the organization's President and CEO. For example, the pro bono consultant team discovered that demands for surgery needs differ by county and identified a need for OA to better match demand with supply.

“We need to understand our market penetration of services and where the greatest need is”

**BENJAMIN AUNE,
President and CEO, Operation**

After the team completed discovery interviews, they worked to create a data collection plan and a graphical representation of that data. While there were several ways to capture and display it, the combined team decided on a scorecard that proved to be clear, concise, and balanced. After incorporating OA's feedback, the pro bono team presented the final Strategic Scorecard, and then turned their focus to training and supporting OA staff members. OA staffs were then ready to implement the scorecard in board meetings as well as program and development committees.

The Impact

The score card became a vital tool for OA's staff and Board of Directors. It added sophistication to OA's analysis of critical information and replaced multiple pages of reports and data. Since the project closed in September 2008, OA has presented and discussed the Strategic Scorecard at multiple Board meetings, published it on their website, and used it to engage funders. The staff is confident that it will continue to add value over time.

According to Benjamin Aune, President and CEO of OA, “As an innovative nonprofit health organization, having a Strategic Scorecard gives us a competitive advantage for funds and more importantly, a way to tell the OA story to the Board, engage the staff, and continue to focus our work in ways that allow us to learn and grow, create value for our stakeholders, ensure financial stability and improve internal processes.” Ben saw so much value in

Operation Access Scorecard for Quarter Ending: June 2008					
		Measure	Target	Actual	Status
Learning & Growth					
Staff meet or exceed organizational goals	Percentage of Operating Plan tactics successfully completed or on track		85%	75%	🟡
Maintain a committed staff and stable management	Average employee rating on a scale of 1-10 for the following questions: (1) Do you have the resources to grow in your position? (2) Do you feel satisfied in your job?		8	8.25	🟢
Internal Process					
Match referral volume to local service capacity	Number of counties in which the volume of OA services provided are at least 85% of the volume of eligible referrals received in the county		>=5 of 6	3 of 6	🟡
Increase efficiency in screening process	Median # of days between referral and eligibility decision		7	7	🟢
Increase efficiency in delivery of service	Median # of days between eligibility decision and first appointment with a specialist		<=63	45	🟢
Financial					
Increase diversification of funding sources and achieve revenue goals	YTD income received by category				
		Grants <50K	\$87,500	\$85,000	🟢
	Grants 50K - 99K	\$127,500	\$130,000	🟢	
	Grants >100K	\$600,000	\$650,000	🟢	
	Donations	\$19,168	\$19,061	🟢	
	Consulting Income	\$17,200	\$4,330	🟡	
	Interest Income	\$8,000	\$5,905	🟡	
	TOTAL	\$827,668	\$895,237	🟢	
	YTD income from new funding sources		\$52,850	\$40,785	🟡
Maintain fiscal responsibility and management of expenditures	YTD expenses incurred by category				
		Program Expenses	\$380,520	\$350,430	🟢
	Fundraising	\$60,420	\$58,680	🟢	
	Administration	\$16,130	\$70,507	🟡	
	TOTAL	\$639,070	\$489,617	🟢	
Maintain adequate cash reserve	Number of months current operating cash on hand could finance forecasted expenses		6	4.2	🟡
Provide a high value return for dollars spent on charitable services	Return on Investment - Ratio of amount of donated charity care provided divided by CA's cash expenses		7.1	9.1	🟢
Stakeholders					
Increase participation rate of surgeons and other specialists	% of total surgeons and specialists willing to participating hospitals who are active OA medical volunteers (peak % is approximately 20 doctors)		11%	11%	🟢
Optimize utilization of participating surgeons and other specialists	% of active participating surgeon and specialist volunteers who provided a service during the quarter		50%	47%	🟡
Improve patient outcomes through surgical procedures	% of surgical patients surveyed reporting improved health, ability to work, and quality of life		90%	94%	🟢
Provide donated surgical and specialty services to eligible uninsured people	# of surgical and specialty services provided YTD		428	562	🟡

the process OA underwent in creating the Strategic Scorecard, that he himself became an Account Director on a Strategic Scorecard project for another nonprofit organization.

The Volunteer Team

The pro bono consultant team included professionals with experience in strategic consulting, market research, designing and implementing data management systems, and financial planning and analysis.

Jerry Ball served as Account Director on the team. Jerry is a seasoned Account Director, having completed three Taproot Foundation Service Grants with one currently underway. Jerry is a Vice President at Charles Schwab & Company where he is responsible for integrating and managing advice-related product development initiatives across multiple distribution channels to provide a seamless experience for Charles Schwab & Companies' clients. Jerry earned a B.A. and MBA from Stanford University.

“An excellent team was selected to work with us. Each brought an area of expertise that proved very beneficial to developing the scorecard and in working directly with my staff over a six-month period.”

BENJAMIN AUNE,
President and CEO, Operation Access

Deanna Konrath served as Project Manager on the team. Deanna is a results-oriented professional with 16 years experience working on small and large-scale change initiatives at Kaiser Permanente, a company that has been a long time partner and supporter of Operation Access. In fact, Operation Access' unique service model was co-founded by Kaiser Permanente vascular and thoracic surgeon, Dr. Douglas Grey. Deanna earned a B.S. in Industrial Engineering and Operations Research at the University of California, Berkeley.

Additional pro bono consultant team members included Strategy Consultant **Kathleen McBride**, Strategy Associate **Beau Wada**, and Strategy Associate **Patricia Wong**. These team members brought 59 years of experience with organizations such as PricewaterhouseCoopers, Visa, and Adobe Systems Inc.

About the Client

Operation Access is a nonprofit organization that mobilizes a network of medical volunteers, hospitals, and referring community clinics to provide low-income uninsured people access to donated outpatient surgeries and specialty care that improves their health, ability to work, and quality of life. Learn more about Operation Access at www.operationaccess.org.



About the Taproot Foundation

Every year, hundreds of nonprofit organizations rely on the Taproot Foundation's award winning Service Grant program to provide millions of dollars worth of pro bono strategy management, marketing, HR, and IT consulting services that better equip them to tackle our society's toughest challenges. Learn more about the Taproot Foundation at: www.taprootfoundation.org.

About the Sponsors



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