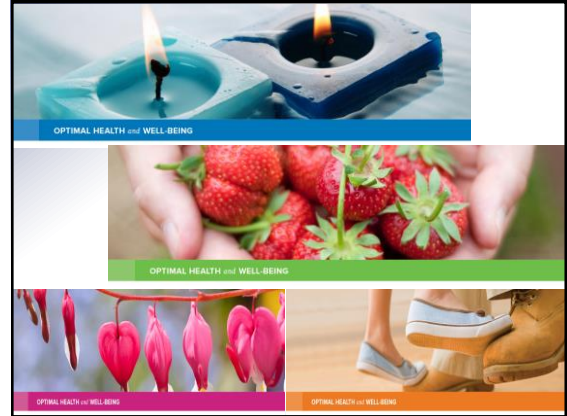


Objectives

1. Summarize the drivers for health system mergers and what to expect when it happens to you
2. Identify key considerations for integration work within laboratory systems
3. Utilize Lean tools to manage integration activities



HealthEast and Fairview

HealthEast

- 4 Hospitals
- 14 Clinics
- 20+ Ambulatory locations
- Home Care / Hospice
- Transportation
- **7,500 Employees**
- 850 Providers

Fairview

- 7 Hospitals
- 40+ Primary Care Clinics
- 55+ Specialty Clinics
- 54 Senior Housing Locations (Ebenezer)
- 30+ Retail Pharmacies
- Home Care / Hospice
- **20,000 Employees**
- **Includes UMMC**



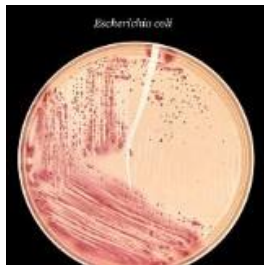
What's in a Name?

- Combination
- Merger
- Acquisition



Importance of Culture

- Mission
- Vision
- Values
- Heritage



Culture Eats Strategy for Lunch!



People

- Greatest Asset
- Common Bond
- Laboratory Community



Technology

- LIS
- Intranet access
- E-mail Platforms
- Parking
- Leaders managing people across 2 organizations

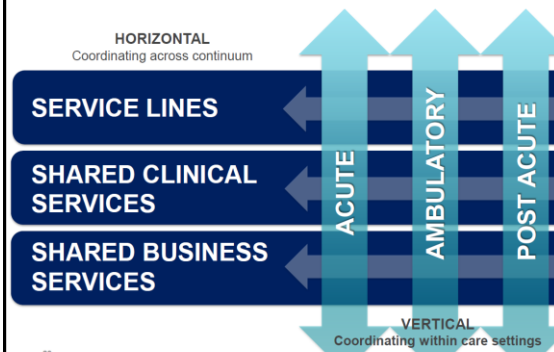


System Level Integration

- Leadership Structure (Matrix)
- Branding
- Legal / Accreditation
- Purchasing – Supply Chain / Contracts



Seamless Integration is Where the Horizontals and Verticals Come Together



Laboratory Integration

- 45-minute Brainstorming Session
- Leadership Structure
- IS Technology (Short-term / long term)
- Equipment
- Test Standardization
- Central Lab Concept
- Policy and Procedure
- Blood Management
- Test Utilization/Management
- Pathology



Quick Win\$\$\$

- LIS Bridges
- Insource Testing / Reference Lab Contract = \$500,000
- Outreach
- Pathology (3 groups)
- Pain Points or Urgent Needs
 - POC Glucose Testing
 - HPV Testing
 - Special Coag



Process

- Integration Team
- Vision
- Site Visits
- Communication
- Project Management
- Lean Tools (A-3 Plans / A-3 Projects)



Early Challenges

- Due Diligence
- Rumor Control
- Staff anxiety
- Complacency (Push vs Pull)
- Vendor Reaction
- Asset and Contract Lists
- Delays and misunderstanding
- Time!



Project Plans

FDL-HML Integration: Mobile Phlebotomy											
Project Owner:			Team Members:								
Debbie Rudloff			Eric, Linda, Susan, Joy, Janet Hansen								
Objective: what outcomes do we need to achieve?											
Integration of Mobile Phlebotomy											
Scope: what is included and not included in the project?											
In Scope: All aspects of Mobile Phlebotomy - LTC, AL, Behavioral Health (Pharmacy), Complex Care											
Out of Scope: Customer Service, Out Patient Organ Transfusions, Home Care, Infusions											
Implementation Plan: What will it take to put the future state process into play? List major tasks.											
Timeline (weeks) - use Monday	7/1	7/8	7/15	7/22	7/29	8/5	8/12	8/19	8/26	9/2	Task Owner
1. Develop Outreach Opportunities	+	+	+	+	+	+	+	+	+	+	Eric
Recommendations	+	+	+	+	+	+	+	+	+	+	
2. Evaluate "Check-in" Portal	+	+	+	+	+	+	+	+	+	+	Joy/Susan
Recommendations	+	+	+	+	+	+	+	+	+	+	
3. Tracking Opportunity (GPS)	+	+	+	+	+	+	+	+	+	+	Eric
Recommendations	+	+	+	+	+	+	+	+	+	+	
4. Evaluate Scheduling Process	+	+	+	+	+	+	+	+	+	+	Deb
Recommendations	+	+	+	+	+	+	+	+	+	+	
5. Enhance System Under Identifying	+	+	+	+	+	+	+	+	+	+	Eric
Recommendations	+	+	+	+	+	+	+	+	+	+	
6. Evaluate Standard of Performance	+	+	+	+	+	+	+	+	+	+	Eric
Recommendations	+	+	+	+	+	+	+	+	+	+	
7. Staff Standard and Policies and Procedures	+	+	+	+	+	+	+	+	+	+	Joy/Susan
Recommendations	+	+	+	+	+	+	+	+	+	+	



Weekly Status Reports

FUNCTIONAL TEAM:	Deborah		Primary owner has responsibility for submitting the status report weekly	
PRIMARY OWNER:	Debi Rudloff	Marina Lawson	Eric Sanger	Janet Hansen
TEAM MEMBERS:	Debi Rudloff	Marina Lawson	Eric Sanger	Janet Hansen
STATUS REPORT DATE:	6/29/2018			
OVERALL TEAM STATUS (G or R):	G			
REASON IF GREEN OR RED:	Short note to discuss overall status			

Key Milestone, Decision, Process - Be specific as possible	Target Date of Completion	% Complete	Status (G, R, I)
1. Consult current HE reference Lab tests to AHUP	10/14/17	100%	G
2. Assess and correct all current search items that can be performed internally	11/09/17	100%	G
3. Assess opportunity for shared Diagnostics linear replacement	09/19/18	100%	G
4. Assess PHL testing, consider comparison to FY Outreach testing process with discussion	07/01/18	80%	G
5. Continue work to centralize tests	12/31/19	0%	G
6. Review and determine Blood Bank support and equipment	08/30/18	0%	R
7. Implement Staff Ready scheduling software at Health East	12/31/18	0%	G



Where are we now?

- Organization Perspective
 - Leadership Bonding
 - Corporate Structure
 - Operating System
 - Leaders in transition
 - Progress with U of M / UMP agreements
 - Mission, Vision, Values
 - Clear Priorities / True North
 - Strategic Plan
 - Transparent Communication
- Laboratory Focus
 - Leadership bonding
 - Tools and Processes
 - Quick wins achieved
 - Outreach structure
 - Standardization Committees
 - Leveraging strengths
 - Clear vision for future



Ongoing Challenges / Limitations

- Organization Wide
 - Information Technology
 - HR Policies
 - HR Systems
 - Finances
 - Delays in Leadership
 - Tracking AME
 - Provider Contracts
 - Business Analytics
- Laboratory
 - Common Policies/Procedures
 - HR recruitment snafu's
 - Vendor Contracts
 - Master Contracts
 - Information Technology timeline
 - Central Laboratory Space
 - Delays in Leadership
 - Pathology (3 models)



Next Steps

- Structure becoming more critical
- Epic Upgrades
- Visibility
- Centralization
- Contract Review and Asset Management
- Courier
- IS Roadmap



Lessons Learned

- Focus on People and Relationships at all levels
- Develop plan for Vendors / Contracts as early as possible
- Communication coordination and how to sustain
- Common vision
- Tours and photos
- Delay in org structure is risky and painful
- Patience
- Be realistic!
- Lab is different (we are special!!)



Discussion



ANNUAL MEETING

JULY 29-AUGUST 2, 2018 | SWISSOTEL CHICAGO | CHICAGO, ILLINOIS