



Beartooth Billings Clinic

Real people. Exceptional care.
Community owned.

STRATEGIC PLAN

FISCAL YEARS 2024 THROUGH 2026



OUR MISSION AND VALUES

OUR MISSION

We save lives and promote healthy living.

OUR VISION

Beartooth Billings Clinic will be a National Leader for Excellence in Integrated Rural Health Care.



OUR CORE VALUES

We believe in

- Integrity
- Accountability
- Stewardship
- Innovation
- Passion for Excellence
- Love
- Compassion

REAL PEOPLE. EXCEPTIONAL CARE.

Serving as the CEO of Beartooth Billings Clinic is truly the pleasure of my career to date. Beartooth Billings Clinic aims to be the trusted healthcare provider for Carbon County and surrounding areas, striving to deliver an exceptional experience with every interaction. We demand excellence from ourselves and value the fundamental role that rural health care plays in Montana.

Our Mission at Beartooth is truly the guiding principle of all we do. The team is committed to our values of integrity, accountability, stewardship, innovation, passion for excellence, compassion, and most of all – love – to guide how we treat our patients, families, and each other. Providing access close to home is our goal, and we embrace our imperative responsibility to our patients in the delivery of the highest quality care. Our teams are driven and skilled in their professions and fully believe in saving lives and promoting healthy living.

Beartooth Billings Clinic takes great pride in being one of the largest employers in Carbon County with 150+ team members. Employment opportunities span the full array of experience, and our leadership team is committed to partnering in our community to provide career paths that start as young as high school. Creating an environment that is kind, safe, and secure helped to award Beartooth Billings Clinic as Montana's "Best Place to Work" for small hospitals according to the Montana Hospital Association in 2022. This is not a responsibility we take lightly and will do all we can to support this for the long term.

I would personally like to thank our Governing Board, our Foundation Board, our community, and our patients for unwavering support for our cause. We are grateful for each one of you as we continue to navigate the challenging healthcare landscape.



Abby Lotz, Chief Executive Officer

A stylized, handwritten signature in blue ink, which appears to read 'Abby Lotz', is positioned over a white circular graphic that resembles a sun or a starburst.

PILLARS OF SUCCESS



Beartooth Billings Clinic Leadership, Physicians, Advanced Practice Providers, Governing Board, Foundation Board, and Billings Clinic Regional Team utilized national, regional, and local trends, subject matter experts, industry best practices, quality and safety metrics, employee satisfaction surveys, and the community health needs assessment to construct strategic priorities. Considerations for growth, revenue diversification, new service offerings, innovation and financial stewardship were all focus areas for planning.

Five Pillars and Priorities were identified for the 3-year plan.

- 1. Community:** *Invest in our Community*
- 2. Culture:** *Invest in our People*
- 3. Finance:** *Invest in Stewardship*
- 4. Growth:** *Invest in our Future*
- 5. Performance:** *Invest in our Quality*

It was important to remain flexible and able to pivot with unforeseen challenges, while also encompassing and representing all areas of the organization. Leadership's goal is to create a living, breathing document to which all team members at Beartooth feel connected and understand the roles they play in the success of the Plan.

Action items with supporting measurable goals will be identified through work breakdown structures to track progress and achievement of objectives. The leadership team will develop a transparent framework to share progress over the next three fiscal years. Continuous evaluation and feedback will be necessary to ensure the content remains relevant. The Plan will be in effect from July 1, 2023, through June 30, 2026.

COMMUNITY

Priority: Invest in our Community

Actions:

Outreach and Education: Beartooth Billings Clinic strives to participate in community outreach and education in a variety of ways by collaborating with local nonprofits and businesses to reach people where they are. We do this in a variety of ways and will continue to sustain and grow in how we connect with our communities.

- Red Lodge Fire Rescue
- Senior Center presentations
- Red Lodge Public School career program
- Beartooth Cub Club (Boys and Girls Club)
- Radio and TV
- Carbon County News

Children's Center and Early Childhood Education: Beartooth Billings Clinic operates a nonprofit, state-licensed and regulated children's center for kids ranging from two years old to pre-kindergarten. The center provides daily childcare, preschool and summer programs (for children up to 12). The Children's Center appreciates the support of the community including the City of Red Lodge and The Kids Corner. The Kids Corner contributes a portion of its proceeds to assist our center and is located at 18 N. Broadway Avenue, Red Lodge, MT.

Community Health Needs Assessment: As a critical access hospital (CAH), Beartooth Billings Clinic participates in conducting a community health needs assessment (CHNA) every three years. This assessment helps to provide directional trends as to where there are healthcare or access gaps in Carbon County. BBC is then able to plan for areas where support can be offered by way of education, outreach, resources, services, or financial assistance in response.

Partnerships:

Our organization takes pride in supporting and partnering in spaces that help to increase access to healthcare and career opportunities in our service area.

- CART – Public transit service through the Red Lodge Area Community Foundation
- Red Lodge Public Schools – Sports Medicine & Functional Movement, Certified Nursing Assistant curriculum
- St. John's United – The Willows
- Red Lodge Fire Rescue
- Home of Champions Rodeo
- Beartooth Billings Clinic Auxiliary and Volunteers
- Kids Corner

Measures of Success:

1. Giving Campaign Milestones
2. Community Events and Interactions
3. Children's Center Enrollment Rate
4. Community Health Needs Assessment



CULTURE

Priority: Invest in our People

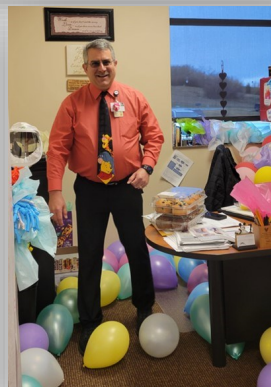
Education Structure & Resources: Beartooth knows that to continue to elevate our expertise and competency, there is a need to invest in a robust educational structure for our employees. The concept is that resources will be devoted to the development, delivery, evaluation, and recognition of our team members who desire also to invest in themselves. It is our responsibility and aim to provide an environment with professional growth opportunities.

Benefits Strategy: Our leadership team is acutely aware that benefits and compensation are important for the livelihood of our employees. With inflation concerns, housing shortages, and childcare challenges in Carbon County, we know that to retain our employees, we must continuously evaluate our benefit package. This includes continuing to lead the market in compensation through merit and market adjustments, incentive bonuses tied to achievement of quality goals, comprehensive benefit packages, discounts on services and a competitive retirement plan. We also know that supporting the health and wellbeing of our team members from both physical and psychological angles is imperative today.

Competitive Work Environment: Offering an environment with great culture, flexible scheduling, promotion of time away, and psychological safety is a priority at Beartooth. Rewarding and recognizing our employees is a cornerstone of our practice. The longevity of team members is a great pride for Beartooth, and it is important that we maintain it for years to come.

Measures of Success:

1. Retention Rate
2. Turnover Rate
3. Experience Scores
4. Time to Fill Positions



FINANCIAL HEALTH

Priority: Invest in Stewardship

The financial health of our organization is foundational to the goals we achieve. Through excellent stewardship of resources, Beartooth can sustain operations,

Actions:

Accountable Care Organization (ACO):

In 2023, Beartooth embarked on a journey to participate in an ACO with Signify Health. An ACO is a collective group of healthcare providers who partner to give highly coordinated and quality care to Medicare patients. At any given time, anywhere between 55-65% of our patient population is covered by Medicare. Through the Medicare Shared Savings program, Beartooth can set measurable objectives to achieve to lower the overall cost of care. Examples of processes and metrics being monitored:

- Annual Wellness Visits (AWV)
- Hierarchical Condition Category (HCC)
- Transitional Care Management visits
- Coding Audits and Evaluations
- Documentation Accuracy and Optimization of Electronic Medical Record

Maximize Reimbursement:

Healthcare is complex and while innovation is excellent, tools can often be underutilized and ineffective. Documentation is cumbersome and our goal is to make this as seamless as possible for all our clinical providers and team members along the care continuum. The continuum includes patient care, precision documentation, accurate coding, timely billing, and evaluation of opportunities to improve efficiency with all processes. Our team is dedicated to improving the workflows and reimbursement for the care we provide by conducting ongoing assessments through regular workgroups to continue separating work into manageable pieces. We also owe our patients a billing experience wherein they find trust and confidence.



Measure of Success:

- Percentage of Annual Wellness Visits completed.
- Risk Adjustment Factor score
- Percentage of breast and colon cancer screenings completed.
- Shared Savings and Quality Awards from payers
- Coding Audits and Accuracy tracking
- Accounts Receivable Days
- Operating Margin
- Net Patient Revenue

GROWTH

Priority: Invest in our Future

Actions:

With the environment of healthcare delivery changing, demonstrating a consistent shift from inpatient care to outpatient services, Beartooth Billings Clinic must continue to diversify our revenue through growth of services. Careful planning must take place through the utilization of data as well as analysis of volume patterns over the course of several years. The pandemic makes this challenging in the sense that trends changed significantly during that period, and it is hard to understand if we have reached the “new normal.”

1. Master Facility Planning – necessary to understand growth options as clinic volumes rise, outpatient procedures increase, and more support staff is needed to operate Beartooth.
2. Infusion Services – Data shows patients are traveling outside of Carbon County to receive infusions. FY24 will be a planning and implementation year for a more comprehensive infusion center at Beartooth, offering a menu of medications and outreach to key stakeholders in keeping care local. The BBC Foundation campaign will gear its messaging towards supporting this cause.
3. Physician Demand Studies – These are important to understand if BBC could support bringing on specialty employed providers. Areas of interest include optometry/ophthalmology and dermatology.
4. Self Service and Cash Pay Options – As revenue diversification is explored and more emphasis is placed on health and well-being, additional services such as cosmetic medspa offerings, elective infusions, and/or cash pay for therapy, lab, and imaging, should be considered.

Measure of Success

will be determined after initial actions are complete to help guide next steps.



PERFORMANCE

Priority: Invest in Quality

Actions:

Enhanced Imaging Services: Beartooth knows it is important for our patients to be able to receive high quality tests and imaging close to home. It is equally important to our internal, external and outreach providers.

- Expansion of MRI capacity
- Upgrades to imaging equipment (x-ray/CT)
- Increasing access to mammography and ultrasound
- Exploring additional services to offer

Procedural Outpatient Services: This has been an excellent service line for Beartooth and has proven to be a desired and appreciated service for our patients. Visiting providers from both Billings Clinic and Intermountain Health come and perform endoscopies at BBC. The team has added procedure days over the years, as well as started to expand and perform some general surgeries. The goal is for the team to grow the volumes from current state for both endoscopy and general surgery. It should be noted that Beartooth will continue to explore and evaluate additional surgical offerings and services to implement for our market.

Occupational Health: This endeavor will be a multi-year, multi-faceted plan as there will be an internal and external approach. Occupational health services can be very valuable for employers for both recruitment and ongoing operations.

- Implementation of internal process for Beartooth employees to have an occupational health visit. With the pandemic, it was realized that there has not been a streamlined way to get employees diagnosed when ill with guidance and assessment in when it is safe to return to work.

Measures of Success:

1. Procedural volume targets
2. Develop baseline 3D mammography volumes
3. Evaluate feasibility of full-time MRI



BEARTOOTH BILLINGS CLINIC FOUNDATION

Providing Awareness, Fundraising, and Stewardship Support

The Beartooth Billings Clinic Foundation's purpose is to provide philanthropic support to Beartooth Billings Clinic and help ensure they are able to fulfill their mission to save lives and promote healthy living. It is a task we take seriously and are honored to do.



Linda Harris, CFO &
Director of Foundation

At our recent Board retreat we worked toward how best we can align our strategy to help Beartooth Billings Clinic achieve theirs. We came away with ideas on how to assist with educational needs, equipment requests and to continue to grow the endowment, our legacy to Beartooth Billings Clinic.

The Foundation's recent purchase of Beartooth Billings Clinic's new 3D Mammo is just one of the many ways we offer our support. Our annual Ball not only helps support a "wish" list for Beartooth Billings Clinic but helps foster community engagement.

It is my privilege to be a part of both Beartooth Billings Clinic Foundation and Beartooth Billings Clinic. I am honored to work with both Boards and especially help lead the Foundation Board as they embark on developing their strategic plan.



**Beartooth Billings Clinic
Foundation Legacy**

A handwritten signature in black ink that reads "Linda Harris".



**Beartooth Billings Clinic
Foundation**

COMMUNITY NOTEWORTHY

FY23 Sponsorships & Support

- Carbon County 4H/FFA Fair
- Red Lodge City Pool
- Red Lodge Fun Run for Charities
- Red Lodge Songwriter Festival

PATIENT QUOTEWORTHY

CLINIC:

- σ All Staff, Nurses, and Dr. Burfeind were professional, proficient and friendly.
- σ You guys are the best. We drive from Billings to doctor at the clinic.
- σ Nursing staff was excellent, and Dr Ortiz was outstanding. Overall exceptional quality service. Thank you.
- σ I have always received great care at Red Lodge.

EMERGENCY DEPARTMENT:

- σ Dr. Oley was such a delightful professional which made my 94 year old mother feel at ease about her ankle injury. Many thanks to the entire nursing team for her care.
- σ Within 2 minutes of walking through the door, the staff had completed my check-in process and taken me back to a room where they made me more comfortable. Nursing staff and ER physician provided great care. They were friendly, caring, professional, confident. I felt like I could completely trust my care to them. I left in much better shape and with much less pain than when I arrived. Everybody's care that day was beyond what I could have hoped for. I work in a family practice clinic in South Dakota, and I know I that I would not have had such a positive experience at my local ER, from check-in through evaluation and treatment. Thank you so much for your care.

RADIOLOGY:

- σ Love ultrasound tech
- σ The technician was SUPER in all aspects of my visit.

LAB:

- σ Always a great experience! Thank you!
- σ No issues with the blood draw. Technician was friendly and a pleasure to deal with.
- σ Great lab techs who know how to take blood pain free.

Physical Therapy:

- σ Both therapists that worked with me were very kind and very knowledgeable. They made it so I wanted to keep coming back. They made it enjoyable.

It was all good. The therapist was very knowledgeable.

Transitional Care:

- σ I could not have managed at home due to being immobile and frail. The staff at Beartooth Hospital are fabulous and very caring. The facilities are very high standard and beautiful.
- σ The care was excellent.
- σ Couldn't have been treated better.
- σ All in all my experience was excellent. Everyone one from the housekeeping to the professional staff made me feel they were there for my needs. I would recommend Beartooth Billings Clinic very highly.
- σ I have had extensive hospital experiences from cancer treatment problems. Red Lodge clinic was the best hospital I have ever been in, bar none.



THANK YOU FOR YOUR SUPPORT



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