

Anchor Mission Playbook

New Learnings and Findings
in Anchor Mission Execution

prepared by

Rush University System for Health

with support from

Healthcare Anchor Network



6.1

Engaging Business Leads and Aligning with Anchor Mission-Adjacent Departments

At Rush, anchor mission execution has taught the anchor mission team that organizational engagement and internal alignment are the biggest keys to success in achieving anchor mission goals. This section explains how to engage additional business leads who serve key functions in anchor mission execution—these individuals are more deeply involved in the everyday work than executive leadership sponsors and already-designated champions are sometimes difficult to engage. The section also illustrates how having an understanding of the way business departments are structured and what drives operational success as part of their internal strategies is key to discerning how the anchor mission fits within the department’s existing priorities. Without having clarity on the business imperatives that drive each business department, it is not possible to align anchor mission execution in a way that is operationally efficient and sustainable.

6.2

Tackling Departmental Complexity: HR Organizational Charts

Human Resources (HR) is a department that encompasses many functions that go beyond hiring and onboarding new employees, and anchor mission teams should leverage each and every HR function to advance their strategies. As such, it is important to understand how these different functions contribute to executing the anchor mission.

HR functions and their general goals and how they tie into anchor mission execution		
	Talent Acquisition & Recruitment	Tasked with maximizing the amount of applicants for requisitions, sourcing applicants for specific roles, and working with hiring managers during the hiring process
	Employee Benefits	Tasked with managing employee benefits and total rewards packages, including negotiation, administration, and promotion to employees (e.g., open enrollment, employee handbooks, retirement, and overall financial stability)
	Compensation	Determines market rate for salaries and conducts pay analyses to stay on top of the sector and ensure equity in compensation
	Talent Management	Leads strategy to develop and retain employees during the span of an employee’s life cycle with an institution



Learning & Development

Leads development of resources and tools for employees to develop their skill sets and knowledge of their field in order to advance in their careers and meet the needs of the company



Human Resources Information System (HRIS)

Manages employee information systems and all data related to employees



Employee Engagement

Conducts the annual employee survey and determines benchmarks for employee wellbeing

In addition to outlining all stakeholders in HR, developing a workforce strategy requires collaborative work among several HR departments and the Rush departments that onboard new employees, particularly those in high-need roles. A workforce development council (WDC) was a good solution for Rush that allowed multiple, cross-departmental voices to align in one system-wide council. The WDC is an internal initiative tasked with leading the efforts of the system and its subsidiary hospitals, Rush University, and all associated medical groups, to build and maintain an equitable and inclusive workforce. The council also leads oversight of the facilitation, evaluation, reporting, funding and quality assurance of pathway programs. The WDC created four subcommittees (Education and Community Partnerships, HR Policy and Employee Experience, Pathway Programming, and Funding and Advocacy) to manage its initiatives and engage Rush employees across a variety of departments/entities within the Rush system, including HR, student affairs at Rush University, Rush University Medical Group, and hospital operations.

6.3

Tackling Departmental Complexity: Engaging Supply Chain Category Managers

An organizational tool for executing local purchasing work is the regular engagement of category managers (also known as strategic sourcing managers, procurement managers, and purchasing managers, etc.) in support of shifting spend to local suppliers. Category managers manage the process of procuring goods, services, and supplies for specific categories of products in an organization. In their role, they manage contract development, bid processes, negotiations, and execution.

Category managers work with departmental leaders in need of goods, suppliers, or services to ensure the process of procurement is efficient, compliant with regulations, and equitable. A key responsibility of category managers is to maximize profits and cost savings for the organization, which may sometimes put their directives at odds with local purchasing initiatives. It is thus important to engage them in the anchor mission to ensure that as they oversee product categories, they take a comprehensive approach at considering local suppliers who may have distinct qualities indicative of success that they may not typically consider as they review their roster of qualified suppliers.

Bid Calendars and Quarterly Internal Bid Reviews

Once a rapport with category managers is established, the supply chain and anchor mission teams must then shift their focus to developing tools to create and manage a pipeline of local and diverse suppliers and create a process that allows them to seamlessly bid for a contract or complete a purchase order to do business with the institution.

Having an assessment of what contracts are coming down the pipeline is an essential function when seeking to shift spend from an existing vendor to a local one. In most hospital settings, there are often few categories that are directly controlled by strategic sourcing rather than a Group Purchasing Organization (GPO) and the pool of available local and diverse businesses need to be sourced and cultivated over time.

For this reason, it is helpful to have ongoing internal bid opportunity reviews with the supply chain team and the anchor mission teams to determine any upcoming opportunities that may be worth exploring in case it could result in shifting spend to a local supplier. A bid calendar is a useful tool and helps to outline upcoming contract renewals and any RFP timelines that could be shared with business service organizations to source eligible businesses for bid opportunities.

If contract opportunities are sparse, departmental purchasing also provides an opportunity for shifting spend by using contracts that are managed by departmental leaders without having to complete a formal bid process. These opportunities are budgeted for by departments and are under a certain dollar amount threshold (usually under \$100,000). Many departments outsource part of their annually procured goods and services (usually in professional services) to small firms that can deliver quickly and efficiently. Common categories for these engagements include printing, marketing, promotional items, and one-off information technology contracts to create internal platforms for a specific purpose.

Departmental purchasing may be an ideal place to start for some institutions looking to shift spend locally. Having a clear and easy-to-understand purchase order process is helpful for both prospective suppliers and internal employees looking to purchase goods and services for their departments. Rush attempted to employ a departmental purchasing strategy just before the pandemic, and the process involved choosing select departments to pilot a local purchasing program. Rush selected its marketing and IT departments to varying degrees of success. Finding space in existing departmental budgets proved to be difficult, and departments usually did not have knowledge of local anchor mission vendors that could supply their needs. This experience taught the anchor mission team at Rush that engaging vendors and cultivating relationships with them before opportunities become available is a key strategy that should be implemented beforehand and consistently applied throughout the year.

6.4

Understanding and Visualizing Impact Investing

With impact investing initiatives, it is sometimes difficult to explain and understand the way that treasury investments drive community growth, so making that connection explicit among key stakeholders is important in anchor mission implementation. Internal alignment involves the way that internal stakeholders understand, support, and sustain the key drivers of an institution's impact investing strategy. At Rush, helping internal stakeholders better visualize the impact investing process and outcomes has helped in clarifying its role

among other initiatives in the anchor mission strategy. Treasury initiatives can often employ exclusive jargon and language that distances internal and external stakeholders from understanding the place of impact investing in anchor mission execution. To remedy this, Rush employed visualization tools to help its internal anchor mission stakeholders understand how impact investments flow into Community Development Financial Institutions (CDFIs) and become tools for the growth of local businesses in the anchor mission geography. The two examples below outline tactics Rush has employed to help its stakeholders understand impact investing as a key anchor mission strategy.

Visualization of Disbursements

- Visualizing the amount of money Rush has invested over time into CDFIs for our internal departments has improved the ability of our employees to understand the role of our treasury department in our anchor mission commitment.
- Because finance-related initiatives often use jargon that is exclusive to the industry, Rush has made efforts to engage its wider employee base in getting to learn more about our impact investments and developed a glossary of common terms for anchor mission strategies.



Goal: Rush, as a Healthcare Anchor Network (HAN) member, has pledged to allocate at least \$8.5 million to place-based investments to be deployed over five-years starting 2021

Target: Allocate at least \$ MM over 5 years from 2021

Relationships with CDFIs and Success Stories

- Once an impact investing strategy has been implemented, it should remain a top priority for investor hospitals to regularly communicate and support the CDFI partners as they disburse loans throughout the fiscal year. Quarterly meetings are helpful to assess the progress and impact of active loans in the community.
- Another way to engage internal stakeholders in impact investing strategies is to consistently create and share success stories of business growth facilitated by disbursed loans in the impact investment portfolio.



In 2001, Angelina Mendez opened her grocery store and taqueria, La Chaparrita, bringing a slice of Mexico City to Chicago's Little Village neighborhood. [Read More...](#)

6.5

Establishing an Internal Knowledge Management Framework for Anchor Mission

Another strategy to support the sustainability of anchor mission initiatives is having a knowledge management framework. Knowledge management involves the process of creating, using, storing, and sharing knowledge within an organization. For anchor mission initiatives, it means keeping close track of historical data analyses, goal setting documents, dashboards, departmental directories, RACI charts, and marketing materials related to all anchor mission pillars. Creating a central place to store these materials on a cross-departmental collaborative platform already in use by your institution (like Teams, Sharepoint, or Google Drive) is a cost-effective and user-friendly way to manage knowledge outside of the institution's servers. For example, the Rush anchor mission team developed a Teams site for anchor mission, an organizational guide, and a data management framework guide to assist new and future anchor mission employees at Rush during their onboarding to the anchor mission strategy.

Knowledge Management and Sustainability Chart

Goal Setting Dashboards and Historical Data Analyses

Create standardized dashboard templates for business leads to report on anchor mission progress and maintain historical report submissions in a central location.

Marketing Materials

Work closely with marketing to create a menu of marketing materials that promote anchor mission among employees and external partners. Save all marketing materials over time and work with editable templates that can be used year over year.

Department Directory

Create a document with contacts for each department and include the official titles or all business leads. This will ensure that the anchor mission role is aligned with a function, not a person.

Aligning with Anchor Mission-Adjacent Internal Initiatives

A major part of anchor mission implementation involves aligning with institutional initiatives that promote an equitable framework for the way the institution operates and how it engages with surrounding communities. It should be an organizational imperative for anchor mission teams to partner with similar internal initiatives so as not to duplicate efforts or miss opportunities to scale the impact of aligned efforts. Aligned initiatives can include Diversity, Equity, and Inclusion (DEI), Environmental, Sustainability, and Governance (ESG), Community Health Improvement Plan (CHIP), Health Equity, and many others. Below are a couple of examples of how Rush has collaborated with internal initiatives that are aligned with the anchor mission.

Diversity, Equity, and Inclusion (DEI)

At Rush, Employee Resource Groups (ERGs) drive employee engagement in support of diversity initiatives. An ERG is a voluntary group of employees who align behind a common characteristic, interest, or identity and then convene regularly to drive professional development opportunities and create a more inclusive employee culture through events, activities, and resource sharing. Partnerships between anchor mission leads and ERGs facilitate connection with employees on topics of diversity. For example, at Rush, the Disabilities Employee Resource Group focuses its activities on building an inclusive culture that welcomes and provides appropriate accommodations to prospective applicants and existing employees with disabilities, which supports local hiring efforts.

Rush also created a West Side Anchor Mission Resource Group to specifically engage and support employees who reside in Rush's focus geography and other allies. The group focuses on connecting employees to existing initiatives located in the West Side by hosting events with community-based organizations. The group also focuses on advocating for the advancement and development of anchor mission employees and regularly meets with HR and the community health equity departments to seek opportunities for collaboration. Whether operating in the HR or DEI departments, ERGs provide an opportunity to connect the larger anchor mission to current employees and engage them in activities that support anchor mission goals.

Community Health

The anchor mission team partners with the community health benefit department in its annual Community Health Needs Assessment (CHNA) and Community Health Improvement Plan (CHIP). In this collaboration, the CHIP includes local hiring, local purchasing, and impact investing as markers of community health. Anchor mission data from local hiring, purchasing, and impact investing also contributes to annual community benefit reporting. For the Community Benefit Report, Rush reports on anchor mission-related workforce development results, such as the percentage of locally-hired employees and participants in its many career pathway programs. For the CHIP report, Rush reports on its anchor mission-related workforce development, local purchasing, impact investing, and employee volunteer metrics.

Environmental Sustainability

The anchor mission team also partnered with the sustainability department to conduct a webinar on environmental justice and how pollution disproportionately affects Rush's anchor mission communities, which brought into perspective the way environmental determinants of health impact underserved communities. The anchor mission team also partnered with sustainability to create a local restaurant and retail business list for Rush employees. The list details local sustainable vendors that employees can patronize in Rush's anchor mission area. The sustainability and anchor mission departments also collaborate often on local purchasing, as Rush's supply chain department is directly tasked with prioritizing sustainability in products sourced as part of the larger supply chain strategy and [HAN's Impact Purchasing Commitment](#).

6.7

Post-COVID Updates and Implications

The COVID-19 pandemic had significant repercussions that challenged Rush's existing strategies when executing on anchor mission strategies in a way that the original Anchor Mission Playbook may not have accounted for. Below are examples of the multi-faceted ways in which some anchor mission focus areas were notably affected by the disruption of the pandemic:

Local Hiring and Talent Development (Impact Workforce)

Resulted in an upended job market, with mass layoffs and voluntary turnover over a period of two years that came to be known as The Great Resignation. For hospitals, that meant increased turnover and difficulty in hiring candidates for high-need roles. Decreased budgets meant less discretionary spending for staff development beyond the resources included in the benefits packages of institutions. Also, the inability to meet in person interrupted the delivery of career pathways programming for many community members and students seeking to advance through additional training.

Local Procurement and Supply Chain (Impact Purchasing)

Rush's supply chain team experienced tighter budgets, Rush decreased annual spend targets for local procurement by 50% because of smaller organizational budgets. To support local businesses, Rush participated in a number of city-wide collaborative efforts to support local food businesses and continued to assess its annual spend data to determine opportunities to shift spend. Nevertheless, virtual work environments posed barriers when connecting with new vendors, which in turn created challenges in shifting spend locally. Additionally, the pandemic saw many small businesses in certain categories pivot to e-commerce, develop new lines of business, or cease operations entirely.

Place-Based Impact Investing

Rush's treasury department saw an increased need for capital to be disbursed to entrepreneurs through Community Development Financial Institution (CDFI) partners. Many small businesses sought to pivot in a new environment and needed additional debt financing to pursue e-commerce, launch new products and services, and increase their online presence.

Employee and Community Engagement

In-person volunteer work was halted, while at the same time the need for resources, particularly access to COVID-19 vaccines for West Side residents, increased. Rush created the Community Command Center, which was a monthly cross-departmental meeting, to communicate about COVID-19-related needs in the community during this time.

Over the past five years, the landscape for executing anchor mission strategies has drastically changed. The original **Anchor Mission Playbook** outlined strategies and insights to execute an anchor mission approach when the field was developing. Six years later, Rush University System for Health has derived new insights, implications, and tools to aid in the execution of the anchor mission framework.

In this update to Rush's original Playbook, we outline new learnings, challenges, developments and resources that have helped Rush University System for Health ensure the sustainability of its anchor mission in the current financial climate.

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