

Doug Harvell, Chairman  
Institute for Senior Professionals  
Okaloosa, Walton Community College

Subj: Final report on the Speech and Hearing Center Project

This project began with a request in January, 1995, from the secretary of the Speech and Hearing Center's board. (attch. 1)

The Speech and Hearing Center of Fort Walton Beach is an independent not for profit agency which provides audiology and speech therapy services to individuals in Okaloosa and surrounding counties. (attch. 2)

The request for a "management audit" was precipitated by a letter to the board in which the Executive Director, Rosemary LaPorta, who was serving as both center director and speech therapist, asked to be relieved of one or the other of the two responsibilities. She also suggested that the center might need to merge with another operation or expand its own operation if it was to remain viable.

Bob Streicher and I met with several members of the board and with the center's employees and prepared an approach which was presented to the ISP at the May 13 meeting (attch. 3). This twofold approach would look at the merger question and at making organizational changes to meet Ms. LaPorta's concerns.

#### MERGER

Bob Striecher made several attempts over the summer to get together with board members and staff on this part of the project, without success. By August it was clear that Ms. LaPorta had cooled to the merger idea, and told us that one merger candidate was not interested, and because of changes in staff and organization of another, this was not a good time to pursue the issue.

#### ORGANIZATION

In several discussions with Ms. LaPorta she seemed to agree that the center could not support a full-time, non-income producing center director, nor would it be feasible to have a center director who was available to the staff only on a part-time basis. It was clear, however, that she was working many extra hours to keep up, and even then did not feel that she was doing all that needed to be done to manage the center.

I proposed that we try to relieve her of as many administrative duties as we possibly could by:

- rewriting the job descriptions of both the center director and office manager, assigning as many duties as possible to the office manager.
- involving the clinical staff in such things as records reviews and updating the policy and procedures manual.
- working with the board to make sure that they were carrying their share of the responsibilities.

The job descriptions were rewritten, however they were never presented to the board for approval and have not been implemented.

The staff began to review chapters of the operations manual and some drafts have been written and reviewed. That work continues, but has slowed with the recent staff changes.

At the November board meeting Ms. LaPorta submitted her resignation. She cited lack of progress in resolving the question of her dual responsibilities and indicated a desire to enter private practice.

ISP assisted the president-elect, Gloria Battle, to identify a temporary center director and write temporary job sheets until a new center director can be recruited.

#### BOARD RETREAT

The board agreed to be involved in a self-assessment exercise. ISP purchased a survey instrument from the National Center for Non-Profit Boards, and a feed-back retreat was held in January, 1997. A copy of the self-assessment report and a summary of the retreat are included as attachments 4 and 5. Nine of the ten current board members completed the questionnaire, and eight current and one new member attended the retreat.

#### CONCLUSION

The board appears to be more enthusiastic and involved than it was one year ago. Combined with the more active leadership of the new president, this new energy should make a big difference in the stability of the Center. It was clear from the board's discussion at the retreat that they are still open to the idea of merger as a means of reducing overhead and they will continue to look for such opportunities in the future.

The question of whether the center is a viable organization or should consider closing is a complex one, but is answered in favor of the center:

- With close board scrutiny by a strong financial committee, the roller-coaster financial situation has stabilized - for now.

- Even though the number of other providers has increased, the center continues to fill a special need in the community:

  - °The center accepts Medicare/Medicaid assignment, which many other providers do not.

  - °The center offers a sliding scale for charges to indigent patients.

  - °The center conducts programs of free hearing screens for children and seniors.

- Recent changes have strengthened the board.

#### FURTHER ASSISTANCE

Two items remain to be completed:

- The board president has asked for help in conducting a survey of the staff similar to the one done for the board.

- The president asked if ISP could help to identify someone who could look at the center's risk management needs to see if they are adequately met.



Submitted by: George D. Russell, Jr.



Robert E. Streicher, MD

February, 1997