

# Executive Director

My Clinic Is Open, Now What?!?

As Executive Director, you have lead the clinic through its final stages of development and seen it open its doors and begin serving patients. Now the fun can begin! All of the months of planning are paying off as you see the faces of the patients desperately in need of your help.

Much of this time can feel like an exercise in crisis management.

There is a lot of new to get used:

- seeing patients with unique needs
- orienting new volunteers and staff
- adjusting to putting policies and procedures in action
- keeping the organization focused

Hopefully, you have been able to anticipate some of that with the previous months of planning.

During this time, be sure to use the tools the Planning Team and Board of Directors worked to put into place:

- Your Business Plan
- Policies and Procedures

The Board of Directors themselves are there to assist in times of stress.

## Hold Meetings

To help move through these initial first months, be sure to continue to remain focused on the future. Periodic meetings with staff and volunteers to assess how the clinic is running and identify any strengths or challenges will help to divert future problems. If after a few meetings, there are changes that need to be made relating to clinic flow or policies or procedures make them now. Whereas you don't want to be making changes every week, if an issue has identified itself as being a

problem, resolving it now before staff and volunteer create a routine will help you in the long run.

### Build Routine

Now is also a time when you want to make sure you are providing consistent support to the staff and volunteers. You will want to develop a regular supervision schedule for your staff and key volunteers, but initially, checking in often with these folks will ensure everyone has what they need and no problems are going unresolved. It will also give you an opportunity to further reiterate any policies or procedures around reporting and supervision.

### Check the Data

Lastly, as will be discussed in the subsequent Board of Directors section, after a few months, you will want to run an initial report from your Electronic Health Records (EHR) system to get a feel for the data you are collecting. You will want to make sure that you have programmed in the right reports and the right data is being pulled in order to complete reports for both ECHO and funding agencies. If corrections need to be made, now is the time to do it before you have thousands of records to correct or change. Other reports you will need to review are financial and budget reports, usually at the direction of the Treasurer. These documents will most likely be for a Board of Directors meeting and will ensure everyone that money is being spent appropriately in the initial months and that there are no large unbudgeted expenses.

Staying in close contact with your Clinic Consultant during this time will be helpful. In addition to providing support and reassurance, she or he can assist with problem-solving and keeping you focused on the future.