Welcome!

If you are connecting to the audio by cellphone or landline (e.g., not your computer), your audio connection and visual connection need to be joined for the breakouts. To join them:

- First: Find your participant ID; if you are using your phone for your audio, your Zoom Meeting Participant ID should be at the top of your Zoom window
- Then: Once you find your participant ID, press: #number# (e.g., #24321#)
- ✓ The following message should briefly pop-up: "You are now using your audio for your meeting"

Please also rename yourself so we know what organization you're from. This will help facilitate discussion and follow-up. To rename yourself:

- **Find the participant list**: Go to the bottom of your Zoom window and click on the word **Participants**
- Hover/click: Once the participant list pops up, hover over your name on the participant list; you may be able to click rename or you may have to click the more button and then click rename
- Enter your new name: Enter your first name and your clinic's name (e.g., Briana CCI, or Shelly ATSH coach)

Webinar Reminders

- 1. Everyone is muted.
 - **()** *6 to **unmute**
 - *6 to **re-mute**
- 2. Use the chat box for questions and to share what you're working on.
- **3. This webinar is being recorded in the main room.** The slides and webinar recording will be posted to the ATSH program page.



ATSH Webinar: Adjusting the Sails – Refining and Sustaining Our Work

August 19, 2020

Bridget Hogan Cole, MPH Executive Director Chris Hunt, MPH, LSSBB Program Director

Agenda

- Reflecting on our current state confirming or readjusting our program course
- Explore tools to help identify which of our project components to sustain and how to build operational supports to help sustain this work
- Review a Standardizing Change Checklist



Reflecting on Where We've Been, Where We Are Now, & Where We're Going

Where are we now? Looking Internally

- Staffing navigating hiring freezes, layoffs, staff working remotely
- Seeing less patients within the four physical walls of our organizations
- Building/Expanding internal support systems and oversight/management
- Programmatic and/or budget challenges thinking about how do we sustain this program beyond the ATSH program lifecycle
- IT system updates, data capture and reporting challenges

Where are we now? Looking Externally

- Navigating a pandemic
- Implemented and/or expanded use of telehealth across the sector
- Patients have lost jobs, experiencing financial difficulties, hardships, housing and food insecurity.
- Concerned about the impact the pandemic will have on our communities' mental health, higher risk for substance use.
- Shifting budgets and financial supports/priorities from Payers (state, health plans, foundations)



Source: Minnesota Department of Health - https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/swot.html

Project
SWOT
Analysis

	Helpful	Harmful
	Strengths	Weaknesses
Internal (Team/Project-Specific)	(e.g. resources that are accessible; time, funding, staff, leadership, systems, facilities, infrastructure)	(e.g. staff skills/capabilities not yet present; lack of management/team leadership; lack of support/buy in from key stakeholders; missing resources)

Source: Minnesota Department of Health - <u>https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/swot.html</u>

Project SWOT Analysis

External Environment/Or

	Helpful	Harmful
	Opportunities	Threats
(Environment/Org)	(e.g. health plan priorities/interests; funding sources; external partnerships and collaborations; social, cultural, and technological factors that you could leverage)	(e.g. uncertainty of current health policy; withdrawing funding sources; impacted projects as a result of diverted resources; social, cultural, and technological factors that could put your project efforts at risk)

Source: Minnesota Department of Health - https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/swot.html

Sample SWOT – **Patient** Engagement & Satisfaction **Project**

Strengths	Weaknesses
 Recently launched patient advisory councils <i>Priority area for leadership and providers (low pt. sat. scores)</i> CMO is interested in patient reported outcomes 	 Recent provider turnover Don't have budget for tech (tablets) to collect patient feedback Ability to track improvement in Patient Engagement
Opportunities	Threats
 Health plan is also interested, could be \$ tied to improvements Funders and Foundations are investing in Pt Engagement Initiatives Potential to improve patient retention, increase pt. volume 	 If we focus on Pt Engagement will we lose potential P4P funding? If we focus on Pt Engagement how will it impact other improvement efforts? Would patients get frustratea and leave our practice if we over- survey?

SWOT Reflections from Across the ATSH Teams -Internal Factors

Programmatic Strengths

- Routinely screening for OUD
- Increasing number of X-waivered Providers
- Senior leadership and internal support for our MAT program
- Use of telephone/telehealth visits helping to improve show-rates
- Established weekly case review with multidisciplinary care teams
- Reduced stigma with staff
- Established, well-attended group visits

Programmatic Weaknesses/Challenges

- Provider hesitance starting patients on medications without in-person visits.
- Ability to contact patients timely
- Clarity around team roles and responsibilities
- Coordinating care across multiple departments and/or organizations
- Standardized, automated data collection and reporting still requires some manual collection and analysis.
- Financial sustainability

SWOT Reflections from Across the ATSH Teams *External Factors*

Program's External Opportunities

- Leveraging telehealth for expanded support and use in MAT programs
- Stronger collaborative relationships with community partners
- Opportunities for reimbursement with telehealth
- Potential for continued funding to address overdose prevention and MAT

Program's External Threats

- COVID patient hesitance to come to clinic to visit provider and/or pick-up MAT prescriptions; staff juggling challenges of working from home
- Broader financial difficulties faced by organizations that have led to or may result in layoffs.
- Concerns about the pandemics effect on our communities' mental health potential increase in patient volume for patients with SUD and/or behavioral health needs.

Proactively address these program "Weaknesses" & "Threats"

(and take advantage of any new opportunities)

Weaknesses

- Provider hesitance starting patients on medications without in-person visits.
- Ability to contact patients timely
- Clarity around team roles and responsibilities

Threats

- COVID impact on patients and staff
- Broader financial difficulties
- Concerns about the pandemics effect on our communities' mental health - potential increase in patient volume for patients with SUD and/or behavioral health needs.

High Probability/ High Impact Risks

Create Action Plan -Determine actions the team can take address these risks (reduce occurrence, plan around, overcome, etc.)

ATSH Team Story:

Karlie Tepley, LCSW **Hill Country Community Clinic** 8 Addressing **Provider/Staff Burnout**

Dr. Stephen Campbell, Dmin Founder & Director, Center

A spiritual guide for more than 25 years, Stephen founded Center to be a resource that helps individuals and organizations live from their Purposeful Center.

He developed Decompression Sessions as a tool for helping people deal with their stress and anxiety in ways that lead to greater personal resiliency.

Contact Stephen: <u>scampbell@findmycenter.net</u>



CENTER

www.findmycenter.net

IHOC

Creating an Action Plan to Address These Challenges

High-Impact Risks	Action Plan (How team plans to reduce likelihood of occurrence of, or plan around, or overcome that risk)
Program Weaknesses/Challenges	
 Provider hesitance starting patients on medications without in-person visits. Ability to contact patients timely Clarity around team roles and responsibilities 	• Action Item 1 • Action Item 2 • Action Item 3
External Threats	
 COVID – impact on patients and staff Broader financial difficulties Concerns about the pandemics effect on our communities' mental health - potential increase in patient volume for patients with SUD and/or behavioral health needs. 	



SWOT Analysis Activity

- Randomly assigned into breakout rooms
- Chose two program challenges or external threats, and identify 3+ actions that could be taken to address these project risks.

(7 minutes)

Breakout Activity: pick 2 project risks (program weaknesses or external threats and discuss 3+ actions that could be taken to address these project risks.

High-Impa	ct Risks	Action Plan (How your team plans to reduce likelihood of accurrence, or plan around, or overcome that risk)
Program Weakne	esses/Challeng	ges
 Provider hesital patients on met without in-pers Ability to conta- timely Clarity around t responsibilities Coordinating ca- multiple depart organizations Standardized, a collection and r requires some r collection and a 	dications on visits. ct patients eam roles and re across ments and/or utomated data eporting still manual	
Other:		
External Threats COVID - patient	t hesitance to	
 come to clinic to and/or pick-up prescriptions; si challenges of w home Broader financi faced by organi have led to or n layoffs. Concerns about effect on our co mental health - increase in pati patients with SU behavioral heal 	o visit provider MAT taff juggling orking from al difficulties zations that hay result in the pandemics immunities' potential ent volume for JD and/or	
Other:	in needs.	

Audience Feedback

What action items and activities did you come up with?

Type these action items into the chat box now.



SWOT Analysis Template

Instructions: Use the SWOT Analysis template below to brainstorm the Strengths, Weaknesses, Opportunities, and Threats that would affect your project.

		INQC	
	Helpful	Harmful	INCIDENT FOR WHEN BUILDING CARE
	Strengths	Weaknesses	
Internal	Team characteristics that help achieve outcome/ goals (e.g. staff skills/capabilities that contribute to success; existing management/team leadership; support for area of focus; resources that are accessible – time, funding, staff, systems, facilities, infrastructure)	Team characteristics that hinder achievement of outcome/goals (e.g. staff skills/capabilities not yet present; lack of management/team leadership; lack of support/buy in from key stakeholders; missing resources) • • •	an educe likelihood of or overcome that risk)
	Opportunities	Threats	
External	Environmental factors that facilitate success (e.g. health plan priorities/interests; funding sources; external partnerships and collaborations; social, cultural, and technological factors that you could leverage, such as the increase in social media use) •	Environmental factors that prevent success (e.g. uncertainty of current health policy; withdrawing funding sources; impacted projects as a result of diverted resources; social, cultural, and technological factors that could put your project efforts at risk) •	
	· · ·	•	

Following the SWOT analysis, consider:

- Which strengths you can use to your advantage to address/minimize weaknesses.
- How your team could take full advantage of the opportunities.
- How realistic are the threats, and how you might plan for/address those threats.

SWOT Template Available on the ATSH Resources Webpage

11100

Building the Operational* Supports to Help Sustain Our ATSH Project

*Note: we won't be exploring the financial component of this work in today's webinar. Instead, we'll focus on the operational considerations.

We've Heard About Many Successes from Your ATSH Projects

Will these programs and improved outcomes continue on after the program ends?

If we were to check back in on you all in 12 months, will you have sustained these gains?



Research suggests it's going to be a challenge



- Only 33% of QI projects in the UK are not sustained >1 year after completion¹
- Only 30% of innovation projects at Fortune 500 companies actually stick²

Source: (1) Maher L, Gustafson D, Evans A.: Sustainability model and guide 2010. (2)John Kotter. The 8-Step Process for Leading Change. 2013

Why aren't successful projects sustained?

- Lack of support systems developed to help sustain work;
- Lack of communication and intentional effort to help staff understand and manage changes brought by the program;
- Changes in the financial drivers and organizational budgets;
- Staff turnover and challenges backfilling project leads.

Project teams need to be very intentional and strategic about

Sustaining Changes & Spreading Changes

Adopt, Adapt, or Abandon



Traffic Light to Sustaining Change

RED LIGHT: Abandon - What Should We Stop Doing?

YELLOW LIGHT: Adapt - What Should We Adjust & Refine?

GREEN LIGHT: Adopt - What Should We Continue Doing? What should be embedded & sustained?





Abandon: What Should We Stop Doing?

- Despite multiple attempts & testing under multiple conditions, outcomes are not improving, staff don't like it, or it's not worth the staff time/resources
- Avoid seeing this as a failure you still learned many important lessons from these efforts
- Opportunity to redirect time, resources, energy to something else that we're excited to work on

What to do if your team decides to "abandon" an aspect of your project?

Consider taking the following steps

- Communications Team, Leadership, & Key Stakeholder
 Highlighting what's changing and what's staving the same
 - Highlighting what's changing and what's staying the same
- Knowledge Management File Management and Project Documentation
 - Documenting lessons learned and organizing relevant documents and resources for future reference.

Adapted From: <u>https://q.health.org.uk/news-story/resource-guide-to-hibernating-quality-improvment-projects/</u>



Adapt – What Should We Adjust & Refine?

- We're not confident that we've optimized this change
- We still think this effort will lead to improvements, we just need more data and continue to test and streamline
- How can we optimize this aspect of the project? What can we alter/refine to make this change even better? Continue to do PDSA's.





Small Scale Experiments



Iterate & Iterate

Reminder: One of the reasons why changes don't stick is because they are challenging for staff to adopt/remember.



ATSH Team Story:

Ginny Eck, SUD Program Manager JWCH

Policies and Procedures (P&P's) and Cheat Sheets







Adopt: What should we continue doing? What should be embedded and sustained?

- Which components of our MAT program have been proven effective? Which have been optimized to ease staff participation in these changes?
- How can we build supports and position this project component to be sustained over the long-term?

Sustaining Change Requires...

- Project Ready to Be Embedded/Sustained
- Staff Capacity
 - Skills, bandwidth, interest in adopting the change?
 - Champions (Change Agents) closer to the front lines to help monitor and troubleshoot

Organization/Leadership Capacity

- Infrastructure
- Increased leadership engagement
- Systems in place for escalating questions and issues

Moving from Quality Improvement to Quality Control



Helpful Quality Control Strategies and Tools



Source: Crystal Eubanks, MS. Produced for the San Francisco Health Network Quality Improvement and Leadership Academy, 2016.
1) Workflow Design: Workflow Maps



Source: Medications for addiction treatment: Providing best practice care in a primary care clinic. Camden Coalition. https://www.nationalcomplex.care/wp-content/uploads/2019/09/Medications-for-addiction-treatment-FINAL-9.20.19.pdf

1) Workflow Design: Workflow Maps





1) Workflow Design: Standard Work

Providing clarity about what is expected of each team member and how the team should be operating/functioning

- 1. Standardized tasks
- 2. Standardized sequences
- 3. Standard timing
- 4. Standard documentation
- 5. Standard expected performance/behavior

Why Standard Work?



- Teams are juggling a lot right now and it can be tough to remember every step, tool, and protocol.
- We don't want to lose any institutional knowledge and expertise when there is staff turnover

Samples of Standard Work from the ATSH

Teams

Santa Cruz County Health Services Agency MAT WEEKLY FOLLOW-UPS

- 1. Case Manager will continue to call patients every week to check on patients:
 - a. Check in should be on topics such as:
 - · Medication checks: does patient have enough, are they running out?
 - How are patients coping with the current COVID19 situation?
 - MAT COVID19 handout to patient by paper or text.
 - Going over Tier promotion packet with patients that qualify we can do them officially
 once we get back to normal program.
 - Helping patient create a Resume.
 - Checking in on patient Treatment Goals.
 - How's Triggers and cravings and what are they doing?
 - How's their current support system (HTF list)?
 - Online support meetings, etc.
 - Use SMA check in.
 - Do they need Narcan?
 - · Do they need to see a provider?
 - Do they need to speak to IBH therapist or Psychiatrist then connect them.
 - Do you need to update their Social Determinants of Health?
 - Any resources or referrals needed?
 - Any SUD counseling and case management needed?
- Documentation: When doing your telephone encounter make sure you are using the appropriate note. Most of your telephone encounters should be 1x1's because that what's you would have been doing in the office if there was no COVID19.

Click on any of the following:

- Intake- If you are doing an intake over the phone
- 1x1 if you are doing a 1x1 over the phone, this includes checking in
- BUP Refill if you are doing a Bup refill and routing it to prescriber
- MAT Group You won't be using this one at this time
- · Case Management (non-MAT patient) If you are doing this with a non-MAT patient
- CCN (Case Conference Note) if you're doing a case conference note
- CC (Care Coordination for all non-face to face encounters) if you're contacting
 pharmacies, Janus, programs, social security, Medi-Cal, any outside resource,
 etc. Without the patient with you, your contacting resources for the patient to help
 coordinate care.
- Phone this should only be used if there is voicemails, text, and quick communications not 1x1's, not intakes, not Bup refill's
- ER Referral If you get a referral from the ER

2) Tools: Training Materials & New Staff Orientation

Substance Use Disorders and Stigma

SHAWNA ADKINS, LCSW; DEBRA MONTOYA; DAVID TIAN, MD; JESSICA WANG, MD; AND DENISE WILLIAMS-TAYLOR, RN

Alameda Health System, Eastmont Wellness Center Reoccurring training opportunities for staff to sharpen skills, build interest and exposure of the program

Ultimate goal to foster sustainability: building these training materials into staff onboarding plans

ATSH Team Story:

Shannon Shaffer-Killey Operations and Compliance Manager West County Health **Centers** 8 **Provider and Staff** Training



West County Health Centers

Caring for our Communities

a california healtht.center

3) Accountability: Formalizing and Updating Job Descriptions & Program Policies



	Job description	ical teams,
Department: Medical		al health and dental
Supervisor: Director of Nu	rsing	If of patients diagnose
Supervises: None		rt on outcomes of
Classification: Exempt		
Position summary:		 Develop referral to
medical providers and other	substance use disorders is responsible for collaborating with all staff to improve outcomes for our patients with substance use osition will oversee the medications for addiction treatment	visit patients when the inable to come into the
DUTIES AND RESPONSIB	TI TTIEC.	ram name) both in
 Provide case management name) providers to implication a. This may patient co 	LLTLES: Int - collaborate with/ and under the supervision of all (program ove outcomes for our patients with substance use disorders; notude: assessing the need for medication protocols, unseling, and accessing community resources. practice, independently assess and advise patients in areas	is, as they pertain to rds, OSHA and the
related to substance us 3. Maintain the Screening, program shall ensure the primarily alcohol, and p brief behavioral counsel referrais to mental heal 4. Develop and maintain for packet. This packet sho detox/stabilization and i 5. Maximize resimbursemer 6. Understand and implem programs source for pp improve health of patient program (SBIRT). Act as a resource for pp improve health of patient chronic pp b. Developing Welmess (II) 9. Serve as the key contac	disorders. Brief Intervention and referral to treatment (SBIRT) program This at all adult patients receive screening for substance use disorders; ovides persons enagged in risky or hazardous, substance use with ing interventions to reduce substance misuse and/or provide indicar substance use disorder services. In clinica an SBIRT comprehensive referral to treatment di include handouts with all pertinent info on how to access n-patient or outpatient treatment. for all SBIRT care. ent regulations and compliance for specific required reening, Brief Intervention and referral to treatment studies and develop special programs as needed to ts. These programs might include: and pioloting Subscome for opioid dependent patients with	nid-level providers, program changes, cal scheduling, loxone, s n group. These ther speakers at times it process for the ng with CoRR for : information ad MD notes, ent process, formation when DEA
105 Medications for addiction	treatment	olved with providing I emergency I. Remains is active in proups and is available
	as a nurse educator for community. 14. Trouble shoots as the pilot progresses and works closed	

Sample No Show Policy

As a patient of the (*clinic name*), I understand that it is in my best interest to arrive 15 minutes early for my scheduled appointments and to call at least 2 hours in advance if I am unable to keep my appointment time. If I arrive 15 minutes after my appointment time I understand I vili not be seen, and rescheduled for another date and time. An appointment will be considered a **`No Show**' if I do not othfy the (*clinic name*) 2 hours

prior to my appointment time. A "Pre-book" appointment is an appointment that I schedule at least 48 hours in advance.

A "Walk-in" appointment is an appointment that is schedule at least 40 hours in advance.

No Show	Will Result In:
1st/2nd	I will be reminded by front desk staff of my appointment time and may have to reschedule my appointment if my tardiness makes it difficult for me to be seen.
3rd	I will no longer have the privilege to Pre-book appointments and will only be able to be seen (by a medical provider) as a Walk-in appointment. I will be informed that in order to regain the privilege of scheduling Pre-book appointments I must attend to two appointments without a no-show during the current month.
4 th	I will no longer be able to schedule an appointment; I will then have to come to the office and wait to se if there is a cancellation or no-show to be seen. There is no guarantee of being seen this day.
	Ing this document, I agree as a patient of the (<i>clinic name</i>) to the terms and procedures ove.
By signir isted ab Printed r	ove.
isted ab	ame
Printed r	ame
isted ab	ame

Source: Medications for addiction treatment: Providing best practice care in a primary care clinic. Camden Coalition. https://www.nationalcomplex.care/wp-content/uploads/2019/09/Medications-for-addiction-treatment-FINAL-9.20.19.pdf

ATSH Team Story:

Rheena Pineda, PhD Behavioral Health Director **Livingston Community Health** 8 **MAT Team Job Descriptions**



Care for all. Salud para todos.

3) Accountability: Ongoing Measurement Strategy

Develop a strategy for continued monitoring of select program measures

- Which measures? Which measure(s) will provide a helpful and timely indicator for how the program is functioning?
- □ Is the data collection process standardized/automated?
- Who is going to monitor this measure(s)? How frequently should this data be pulled and reviewed?
- If the data is trending in a negative direction, who should be alerted/informed?

Control Charts



If you see the data trend in a negative direction, it's time to conduct some root cause analysis work to determine what's going wrong

More About Control Charts:

- https://www.hqontario.ca/portals/0/documents/qi/qi-quality-improve-guide-2012-en.pdf
- <u>https://www.isixsigma.com/tools-templates/control-charts/a-guide-to-control-charts/</u>



Picking The Right Measure(s) for Longer-Term Monitoring

- **Communication Power** does the indicator communicate to broad range of audiences?
- Proxy Power Does indicator say something of central importance? And is it a good proxy for other indicators?
- Data Power Is there quality data for this measure that can be collected on a timely, regular basis? And in a way that isn't burdensome for staff to collect?



Which Measures Should We Continue to Track?



Consider identifying a few core measures and internal measures that have solid **Proxy, Data,** *and* **Communication Power**

Which Measures Should We Continue to Track?

SAMPLE Ongoing Measures Monitoring Plan

- Screening: % of patients screened for Opioid Use.
- **Engagement**: % of patients with 2 follow up visits within 30 days of initial prescription
- Retention: % of patients enrolled that adhere to medication/ program for 6+ months
- Internal: pulse surveys gauging patient and staff experience

Frequency: Collect/Review Monthly through end of 2021, and if all goes well we'll switch to Quarterly collection/review in 2022.

IHQC's Sustainability Checklist

- **1. Perceived Value**
- 2. Complexity of the Change
- 3. Measurement, Monitoring, & Feedback
- 4. Leadership

5. Staff

- 6. Processes, Equipment, and Technology
- 7. Organizational Fit
- 8. Infrastructure for Sustainability
- **9. External Influences**



Individual Activity (5 minutes)

- Consider which of the 9 sections in the sustainability assessment might be challenging for your team and read through those sections.
- Identify 2-3 areas that your team should invest time exploring over the next few weeks to help position your MAT program for longer-term sustainability
- When you're done, type one of those activities into the chat box.

Scale-Up and Sustainability Resources

- IHQC's <u>Sustainability Assessment</u>
- Spread and Sustainability Toolkit for NHS: http://www.qihub.scot.nhs.uk/media/596811/the%20spread%20and%20sustainability%20ofquality%2 <u>Oimprovement%20in%20healthcare%20pdf%20.pdf</u>
- Implementation and Spread Primer from Health Quality Ontario: <u>http://www.hqontario.ca/Portals/0/Documents/qi/qi-implementing-and-sustaining-changes-primer-en.pdf</u>
- Spreading Improvement Primer from Health.org: <u>http://www.health.org.uk/sites/health/files/SpreadingImprovementIdeas.pdf</u>
- Kaiser Permanente Spread Toolkit: <u>http://ep50.eventpilotadmin.com/doc/clients/IHI/IHI2011/library/M6_presentation_Spreading_Effective_Practices.pdf</u>
- Assessment of Spread Frameworks: <u>https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4731989/</u>

Change Management

- "Made to Stick" and "Switch" by Chip and Dan Heath
- Health Quality Ontario's <u>Change Management Primer</u>

Questions?





Bridget Hogan Cole, MPH, Executive Director 213-346-3238, <u>bcole@IHQC.org</u>

Chris Hunt, MPH, LSSBB, Program Director 213-346-3245, <u>chunt@IHQC.org</u> Poll



Please select the number that best represents your response to the statement:
 Today's session was a valuable use of my time





ATSH Coming Attractions



August 31: Final Progress and Financial Reports Due. Endpoint Capability Assessment (IMAT) Due.



September 29: Celebrate & Learn Webinar (11am – 1pm) <u>Register Here</u>



September 30: Project Conclusion.

