

Learning Lab: Designing Your ATSH Project

Addiction Treatment Starts Here: Learning Session #1

November 7, 2019

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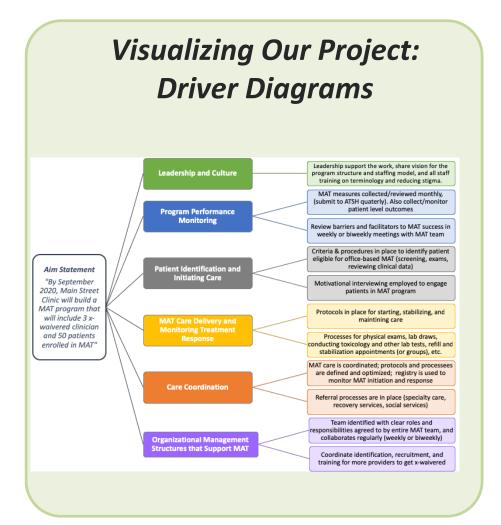
A project of Community Partners 11/2/2019

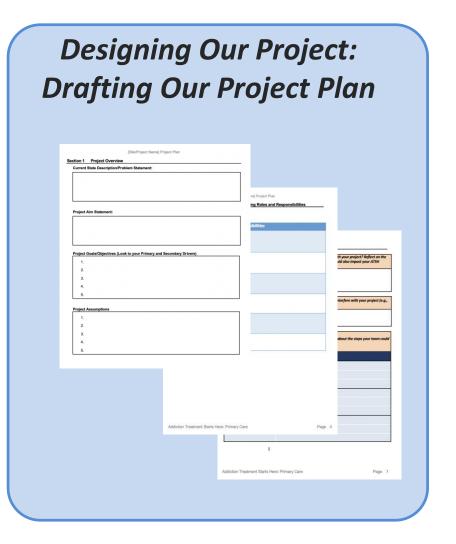
About the Institute for High Quality Care (IHQC)

IHQC – Applied Learning Model

- Our Mission Increasing the quality and accessibility of safety net healthcare
- Since 2007, IHQC has created multiple learning communities –
 participant-defined, applied learning laboratories for clinics, provider care teams to:
 - Engage in quality and process improvement trainings
 - Interact and share promising practices with their peers
 - Apply tools and techniques that will advance their own improvement efforts
 - Prepare for an ever-changing healthcare environment

Our Agenda





First Step in Designing and Testing:

Know Your Improvement Framework

Foundation To Develop and Sustain Strong MAT Programs



- Current approach to MAT
- Learning what works and what could work better in your MAT programs

Current State

Aims

 Defining SMART aims for your project

- How do we know when we get there
- Specificity and relevancy

Measures

Steps to Developing and Sustaining Strong MAT Programs

Identify Drivers

What are primary and secondary drivers that impact your aim?

Design Changes

What can you test to effect the drivers for your aims?

Test Changes

How are you prioritizing what you test?

Accelerate Learning

Are you testing multiple changes at once? How do you disseminate learning from testing cycles?

Implement, Spread, Sustain

When do you implement? When are you ready for spread? How do you sustain change?

Current State



YOUR CLINIC AND ORGANIZATION CHARACTERISTICS

Aims

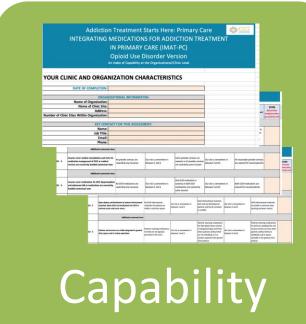




Measures

Re	quired – Access Measures
	MEASURE
A.	Adoption
A1	# of x-waivered prescribers
A2	# of x-waivered prescribers actively prescribing
А3	% of x-waivered prescribers of all eligible prescribers in practice
A4	Ratio of x-waivered prescribers actively prescribing to the clinic's total patient panel size
В.	Reach
B1	# of patients prescribed buprenorphine
B2	# of patients prescribed naltrexone long acting injection
В3	% of patients prescribed buprenorphine or naltrexone long acting injection of all patients with OUD

Current State Activities To Date:



Assessment



Refining Your Core Team



Learning From Your Patients & Staff

Initiative Aim Statements

Elevator Pitch





Mission Statement for a Project

The Aim Statement

- Like an organization's mission statement, the *Aim*Statement sets the tone for the improvement project:
 - Defines purpose of project, what you hope to accomplish
 - Identifies system you want to improve
 - Identifies patient population the improvement will impact
 - Describes why project is a priority
 - Sets the stage for a time frame to complete the project

Project
Aim Statements &
Goals
should include

SMART Elements



SMART Statement - Examples

<u>Time-Bound</u>

<u>Specific</u> – Who/Where

By December 2020, WeCare Health's Main Street
Clinic will provide MAT services to 50 patients by
getting x-waivers for 3 providers, adopting a
comprehensive and efficient addiction screening
process, and developing policies and procedures
for MAT care delivery.

Specific – What system/process

Measureable

Aim Statements – What's Missing?

- "We will increase the number of patients receiving MAT Treatment"
 - Measurable? How many patients?
 - *Time-bound:* By when?
 - Specific? Where? One clinic, all clinics?
 - Specific? How will it get done? Training additional x-waivered providers? Improved screening?



Drafting Our ATSH Project Aim Statement (5 min)

- Specific? Where? Who?
- □ Specific? How will it get done?
- Measurable? How many patients?
- Attainable? Do-able based on time, staff, resources, scale?
- ☐ Time-bound? By when?



05:00

Drafting Our ATSH Project Aim Statement (5 min)

- ☐ Specific? Where? Who?
- Specific? How will it get done?
- Measurable? How many patients?
- ☐ Attainable? Do-able based on time, staff, resources, scale?
- ☐ Time-bound? By when?

Visualizing Our Project – Drafting a Driver Diagram

Steps to Developing and Sustaining Strong MAT Programs

Identify Drivers

What are primary and secondary drivers that impact your aim?

Design Changes

What can you test to effect the drivers for your aims?

Test Changes

How are you prioritizing what you test?

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Implement, Spread, Sustain

When do you implement? When are you ready for spread? How do you sustain change?

What are project drivers?

 <u>Drivers</u> = Topic areas, themes, and/or <u>high-level changes</u> that your team will be focusing on to help achieve your project aim

• <u>Driver Diagrams</u> show the relationship between your aim statement, these drivers, and your key activities

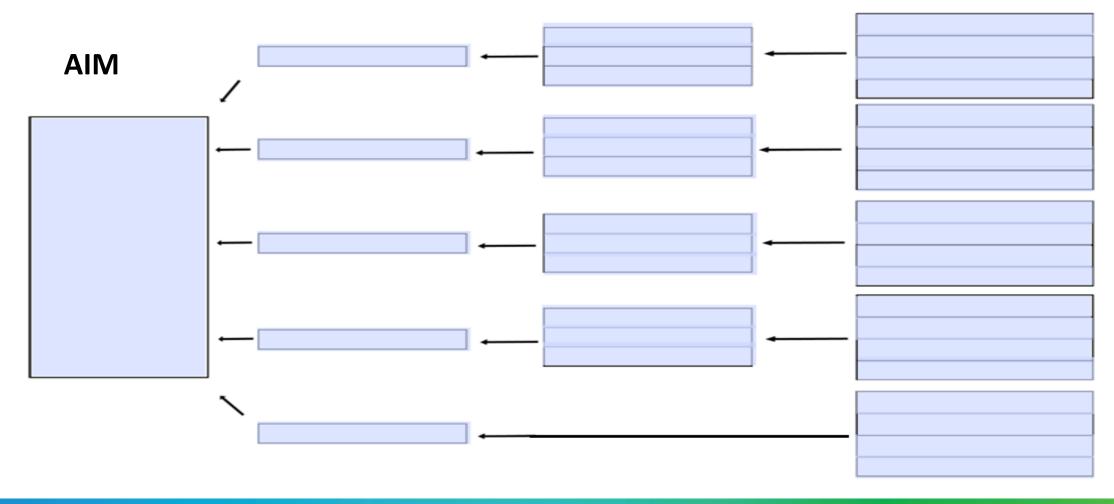
Visualizing Your Secondary Drivers/ Change Ideas Primary Project Drivers Download the Couch to 10K App Aim Train 8 **Practice** Hold times after work for training **Complete the DTLA 10K on July** 4th without My running shoes are ancient. Get stopping **Equipment** the right shoes Find a friend to join the 10k and **Accountability** practice with me

Driver Diagram

Template Primary Drivers

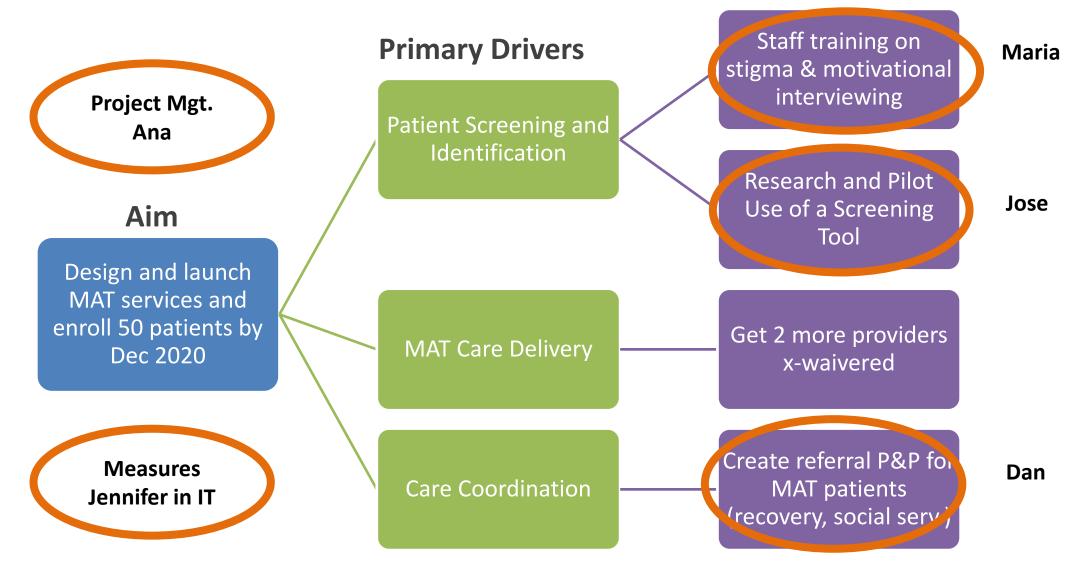
Secondary Drivers

Actions/ Change Ideas



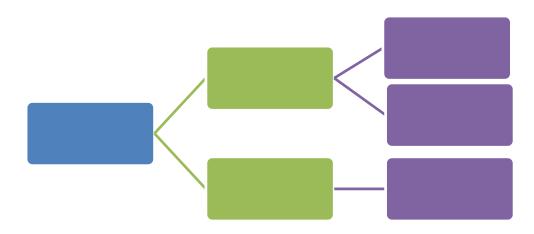
Visualizing Your Project

Secondary Drivers/ Solutions

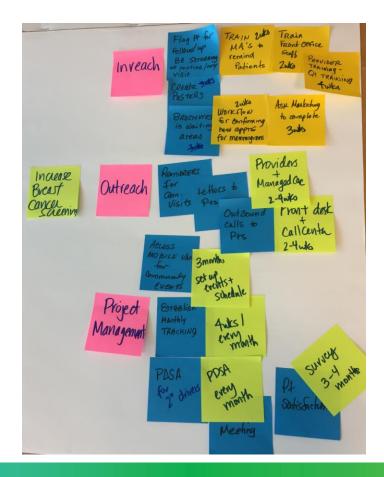


Tools to Draft Driver Diagrams

 SmartArt hierarchy feature in Microsoft PowerPoint or Word



Post-It Notes



Drafting Our ATSH Project Driver Diagram

Recommended ATSH Primary Drivers

Leadership & Culture

Program
Performance
Monitoring

Patient Identification & Initiating Care

MAT Care Delivery & Monitoring
Treatment Response

Care Coordination

Org Management
Structures that
Support MAT

Sample **ATSH Project** Driver Diagram

Aim Statement "By September 2020, Main Street Clinic will build a MAT program that will include 3 xwaivered clinician and 50 patients enrolled in MAT"

Leadership and Culture **Program Performance** Monitoring Patient Identification and **Initiating Care MAT Care Delivery and Monitoring Treatment** Response Care Coordination **Organizational Management** Structures that Support MAT

Leadership support the work, share vision for the program structure and staffing model, and all staff training on terminology and reducing stigma.

MAT measures collected/reviewed monthly, (submit to ATSH quaterly). Also collect/monitor patient level outcomes

Review barriers and facilitators to MAT success in weekly or biweekly meetings with MAT team

Criteria & procedures in place to identify patient eligible for office-based MAT (screening, exams, reviewing clinical data)

Motivational interviewing employed to engage patients in MAT program

Protocols in place for starting, stabilizing, and maintining care

Processes for physical exams, lab draws, conducting toxicology and other lab tests, refill and stabilization appointments (or groups), etc.

MAT care is coordinated; protocols and processees are defined and optimized; registry is used to monitor MAT initiation and response

Referral processes are in place (specialty care, recovery services, social services)

Team identified with clear roles and responsibilities agreed to by entire MAT team, and collaborates regularly (weekly or biweekly)

Coordinate identification, recruitment, and training for more providers to get x-waivered

Sample ATSH Project Driver Diagram

Aim Statement

"By September 2020, Main Street Clinic will build a MAT program that will include 3 xwaivered clinician and 50 patients enrolled in MAT" Leadership and Culture

Program Performance Monitoring

Patient Identification and Initiating
Care

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"By September 2020, Main Street Clinic will build a MAT program that will include 3 xwaivered clinician and 50 patients enrolled in MAT" MAT Care Delivery and Monitoring
Treatment Response

Care Coordination

Organizational Management Structures that Support MAT

Protocols in place for starting, stabilizing, and maintining care

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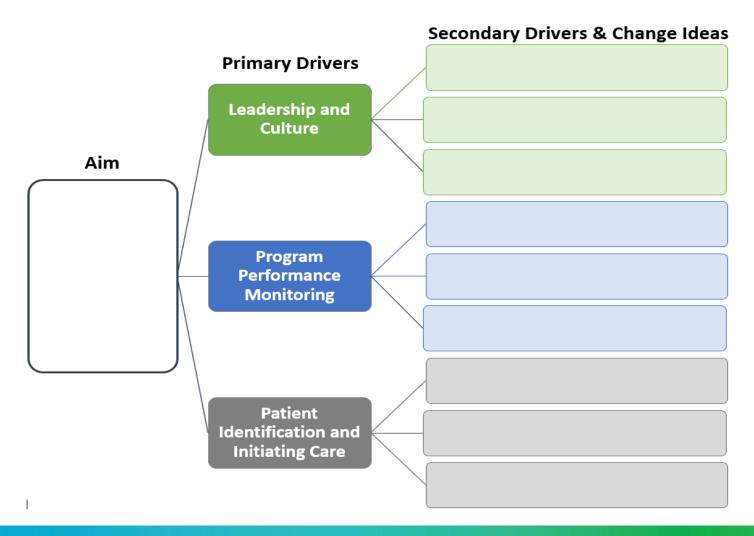
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Where Can I Find Ideas for Secondary Drivers or Important Project Activities?

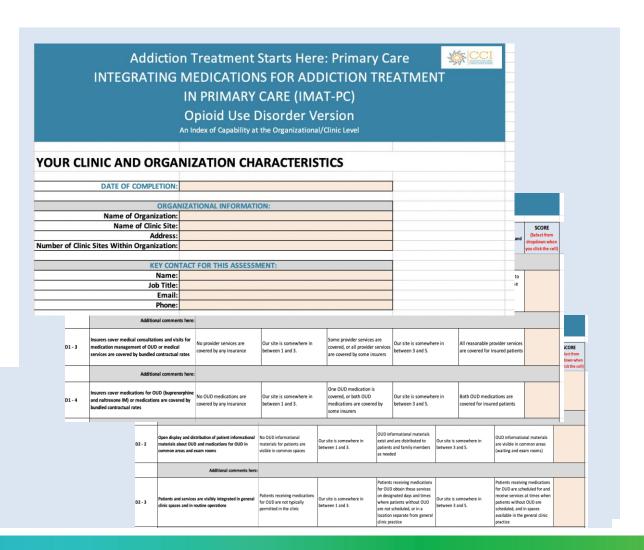


Where Can I Find Ideas for Secondary Drivers or Important Project Activities?

Group Brainstorms

Toolkits and Best Practices

IMAT-PC
Assessment



Benchmark	Description	1	2	3	4	5	SCORE		
D3 - 1	existing patients are screened using a standardized universal measure for opioid use risk	or set of questions is used		A set of questions about substance use is routinely used		A standardized and validated universal screen (e.g. TAPS, NIDA Quick Screen, DAST) is used with all new and annual visits	3		
	Additional comments here:								
D3 - 2	screen positive receive a standardized indicated assessment and, if	No standardize d measure is used, and documenta tion of OUD diagnosis varies		No formal standardized measure is used but OUD diagnosis is routinely documented		A standardized indicated screen (e.g. DSM5 checklist) is used to support documentation of an OUD diagnosis	2		

Change Ideas

Category/Primary Driver:
 Patient Identification and Initiating Care

- Change Ideas:
 - ☐ Update assessment/screening tool that staff use
 - ☐ Improve the frequency that this screening tools is used with *all* patients (at appropriate intervals)
 - ☐ Improve documentation of OUD diagnosis

Visualizing Your Secondary Drivers/ Project Change Ideas Primary Drivers Update assessment/ screening tool Aim **Patient** Update workflows to use Identification & screening tool in all new **Initiating Care** and annual visits Increase number of Improve documentation of patients **OUD** diagnosis enrolled in **MAT** services by 50 patients MAT Care Delivery

ATSH Wave 1 Example: Marin City HWC

> By September 30, 2020, MCHWC will expand its MAT program to its **Bayview Clinic to** treat 50% more patients (45 total active MAT patients) engaged in recovery.

Leadership and **Culture**

Program Capacity

Patient Identification

All staff training on empathy and stigma surrounding SUD treatment - new hire training, and regularly reinforced.

Develop at least 5 community partnerships as a referral base for patients in Bayview

Develop & sustain policies/procedures that allow for the program to be continued despite staff turnover

Adding refill groups in Marin City and Bayview (offer an additional day in MC)

Offer incentive for 90 day retention in recovery

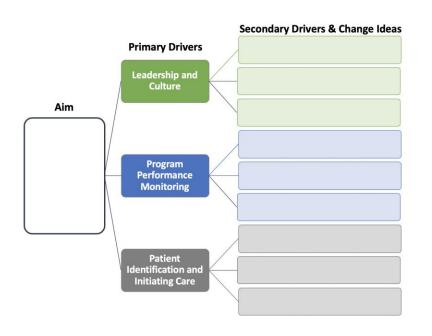
Standardize process for home inductions and introduce as option to our prospective patients

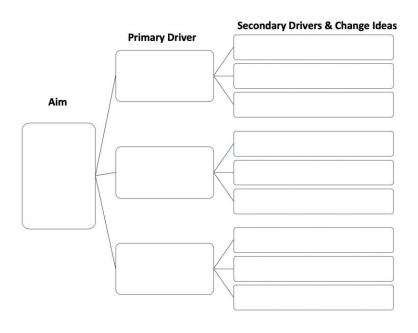
Use standardize tool to screen patients for SUD to identify potential MAT participants

Train staff on internal referral process that is electronically monitored and tracked

Develop procedure to properly screen, document and bill for SBIRT services.

Begin Drafting Your Driver Diagrams





- 1. Review your IMAT-PC Results, and start identifying your MAT project drivers.
- 2. Then start identifying changes or key project activities for each driver



Pair and Share



 For the next 5 minutes, share your driver diagram with another team in the room

- Which Primary Drivers did you chose?
- What are 2-3 of the important change ideas or secondary drivers that your team will prioritize over the next 2 months?

Reminder – Use PDSA's to Pilot and Scale-Up Your Change Ideas

Steps to Developing and Sustaining Strong MAT Programs

Identify Drivers

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Accelerate Learning

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Implement,
Spread,
Sustain

When do you implement? When are you ready for spread? How do you sustain change?



Making **Pancakes**

First few are never perfect.

➤ So we experiment or practice until we get it right

The Model for Improvement

Aim

• What are we trying to accomplish?

AIM

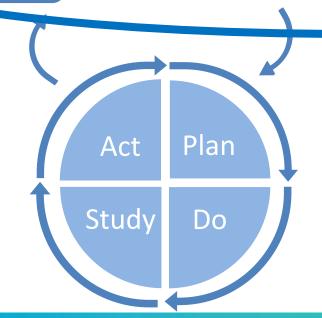
Measure

How will we know if a change is an improvement?

Measurement

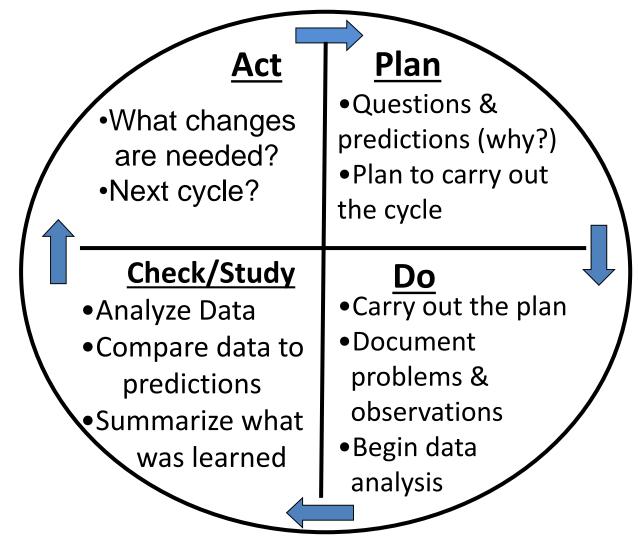
Change

 What changes can we make that will result in an improvement? Effective Ideas



small Tests of change

PDSA – Rapid Cycle Improvement

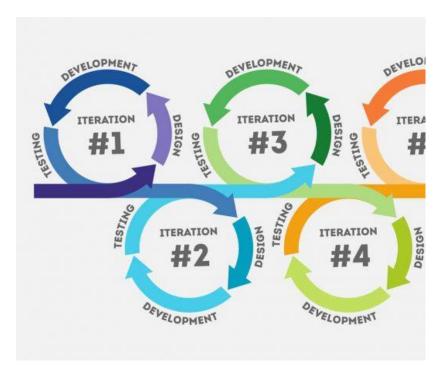


Adapted from the Institute for Healthcare Improvement Breakthrough Series College.

The Model for Improvement and PDSAs essentially rely on:



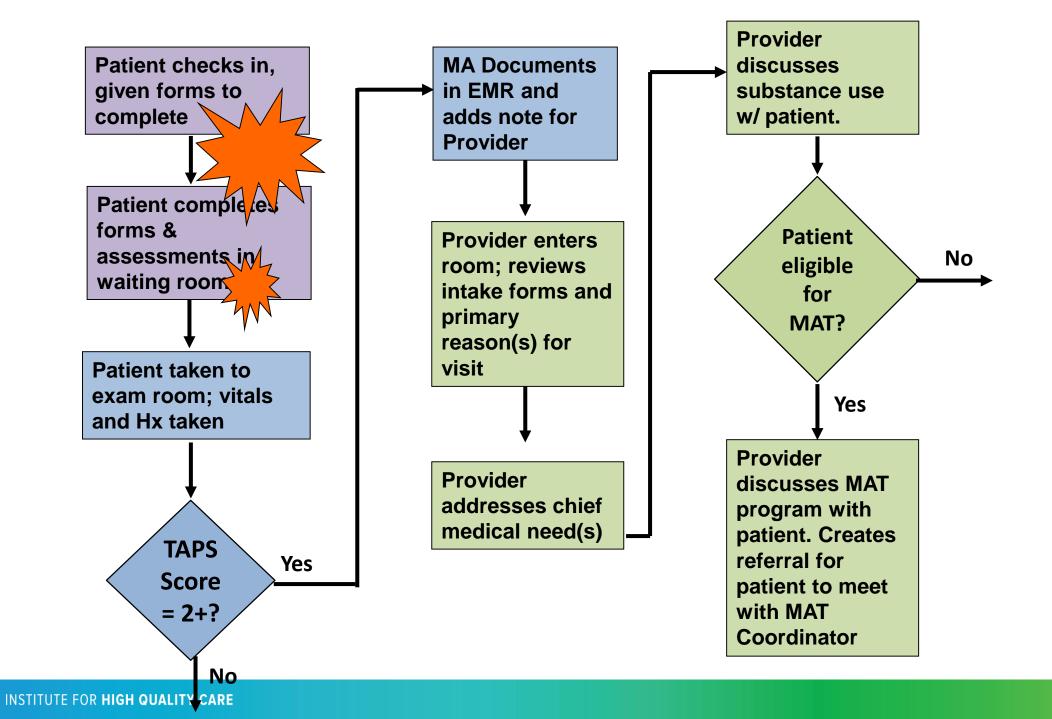
Small Scale Experiments



Iterate & Iterate

Why Experiment & Iterate?

- Pancakes Our first drafts are never perfect
- Opportunity for learning from "failures" without impacting performance
- Increase your belief that the change will result in improvement
- Easier to take one or two small steps than one giant leap
- Document how much improvement can be expected from the change
- Evaluate costs and side-effects of the change



IHQC

Patient checks in, given forms to complete

New patients or patients who haven't been seen for 12+ months are given TAPS assessment

Patient completes forms & assessments in waiting room.

Front Desk enters patient information and TAPS assessment score in EMR

PDSA's For Your ATSH Project Ideas

Addiction Screening Tools PDSA's

- 1. Have care team use TAPS screening tool with 5 patients in the morning
- 2. Use DAST screening tool w/ 5 patients in afternoon
- 3. For 2 days, front desk to give screening to all new patients
- 4. For 2 days, front desk to give screening to existing patients who haven't completed screening 1+years.

Questions?



Stretch Break

Designing Our Project: Drafting Our Project Plan

How to Create Change?

Diagnosing what's missing

Vision + Skills + Will + Resources + Action Plan =

Diagnosing what's missing

ATSH Project Plan

Template with considerations to help organize what's needed to reach your aims:

- Goals & Assumptions
- Team Roles
- Measures
- Activities
- Resources



ATSH Project Plan Template

[Site/Project Name] Project Plan	Project Name] Project Plan	[SiterFloject Name] Floject Flam
	rresponding Roles and Responsibilities	Section 4 Key Success Factors and Project Risks
on 1 Project Overview urrent State Description/Problem Statement:		What are some of the potential challenges and/or risks associated with your project? Refle
Irrent State Description/Problem Statement:		challenges of past initiatives and discuss if any of these challenges could also impact your A Project.
	:/Responsibilities	Project
oject Aim Statement:		Competing Priorities - Are there any competing priorities that might interfere with your pro- new IT system implementations, site renovations, etc.)?
		List the top 3 challenges or risk that your project may face, and think about the steps your
oject Goals/Objectives (Look to your Primary and Secondary Drivers)		take to prevent that challenge/risk from occurring.
1.		Themes Actions or new approaches to test
2.		
3.		-
4.		
5.		
oject Assumptions		
1.		
2.		
3.		
4.		
5.		
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	ary Care	L.

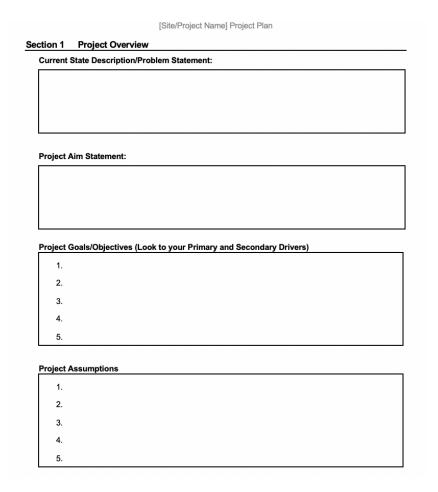
We're going to focus on Sections 1, 2, and 4 this morning

Addiction Treatment Starts Here: Primary Care

Page 7

Section 1: Project Overview

- Description of Current State
- 2. Aim Statement
- 3. Goals/Objectives
- 4. Assumptions



Project Overview

Description of Current State

- Provides an overview of what the current state looks like and why this project is a priority for your organization, your patients, or your staff
- Brief description of what's working well
- Brief description of what's been challenging
- Extra Credit: references to baseline measures or data that highlights why this project should be a priority.

SMART Aim Statement & Goals

 1 Project Aim Statement: 1-2 sentence summary of what you hope to accomplish

- Multiple Goals (3-6) for your project
 - A SMART sentence that describes how you are going to accomplish your aim (referencing a primary driver or important deliverables)

SMART Aim Statement & Goals Examples

Project Aim Statement: By September 30, 2020, MCHWC will expand its MAT program to its Bayview Clinic to treat 45 patients engaged in recovery.

Goals:

- ■By February 2020, empower staff with the knowledge and skills needed identify and support patients with addiction through trainings in empathy, stigma reduction, and screening protocols
- □ By July 2020, develop 5 community partnerships (e.g., local emergency department) to build collaboration and referral networks
- ☐ By Dec 2019, expand the Marin City and Bayview MAT programs to include refill groups

Assumptions

= Conditions that <u>must</u> exist and expectations that <u>must</u> be met in order for your project to come through – i.e., your logic or theory of change to hold true

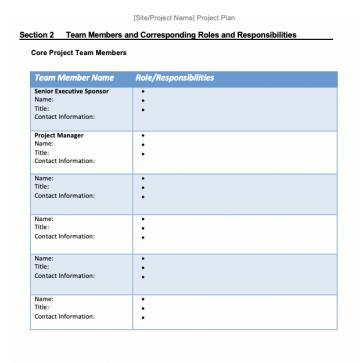
- Some assumptions to consider:
 - Expectations, commitment, engagement of leadership
 - Expectations of patient, provider or other staff behavior
 - Linkage between behavior and health outcomes
 - Results of a certain intervention
 - Dependence on system or technology

Assumptions - EXAMPLES

- We'll be given the time, support and resources to pursue this project
- Home inductions and multiple refill groups will better fit the unique needs of our patients
- By training staff in stigma reduction and best practices in screening patients for substance abuse, patients will answer these screening questions honestly and we will be better positioned to identify and support patients who would benefit from MAT services.

Section 2: Team Roles & Responsibilities

- 1. Team Member Names (Optional: Titles, Contact Info)
- Specific Roles &
 Responsibilities for each team member



Team Members



Effective Improvement Teams Roles

Multidisciplinary Teams

- More creative, better brainstorming
- Bring multiple perspectives, including what "current state" actually looks like and what's already been tried/tested
- Share responsibilities and distribute tasks across the team

☑ Clarity on team roles and responsibilities

- Sets expectations for each team member
- Helps ensure tasks are dispersed/shared across full team
- Shared responsibility and accountability

Effective Improvement Teams Communicate

✓ Formal Team Meetings

- Frequency: More frequent meetings set up teams for success
- Roles: Who attends, who facilitates, who follows-up with reminders for action items.
- Meeting Norms
- Subgroups meeting

☑ Frequent Informal Team Meetings

- Huddles, quick phone calls, email updates, quick brainstorm conversations
- Not always the entire team, may be 2-3 people focusing on a specific project activity or deliverable.

Additional Resources for Building Effective Improvement Teams: http://www.hqontario.ca/Portals/0/documents/qi/pc-team-building-guide-intro-en.pdf

ATSH Project Team Considerations

Sample Roles

- Senior Executive Leader/Sponsor
- X-waivered Clinician
- MAT services coordinator
- Operations Lead

Sample Responsibilities

- Facilitating Meetings
- Reporting project updates to Sr. Leadership/Board
- Liaison to Care Teams to collaborate on screening patients
- Data Tracking

Key Success Factors and Project Risks

Section 4: Key Success Factors/Risks

- 1. Anticipating Challenges
- 2. Identifying competing priorities
- 3. Plan to proactively address these risks

Design	initiatives and discuss if any of these challenges could also impact your ATSH
Project.	
200	
	es - Are there any competing priorities that might interfere with your project (e.g., lementations, site renovations, etc.)?
	enges or risk that your project may face, and think about the steps your team could at challenge/risk from occurring.
Themes	Actions or new approaches to test
8	

Addiction Treatment Starts Here: Primary Care

Page 7

Why do good project ideas....



Sometimes Flop



Common Project Risks and Challenges

Team/Staff

- Staff resistance
- Getting leadership & staff buy-in

Data

- Mining existing data to identify patients
- Establishing criteria that will be used (e.g., patients on high doses of morphine equivalents)

Project Management

 Meeting frequency, communications (up, down, to patients).

Project

 Need for support for the patient during first few inductions

Patient Engagement

 Patients with complex social risk factors, sorting out pain management versus addiction

External Issues

- Logistical issues (e.g., locating pharmacies),
- Establishing relationships with nontraditional community partners

What Can We Do to Plan for, or Mitigate, these Risks?

Lack of Staff Time

☐ Get senior leadership approval for regular meetings

☐ Leverage morning huddles 1x per week for quick project updates and brainstorming

Staff Biases or Resistance to MAT Treatment

- ☐ Short staff survey or interviews to better understand the current perceptions around addiction treatment and MAT services
- ☐ Staff training on stigma.
- ☐ Recurrent staff meetings where the role legitimation of OUD treatment in primary care is emphasized

Section 5: Deliverables, Activities, & Timelines

Addiction Treatment Starts Here: Primary Care
Learning Session 1
60-day workplan

Instructions:

Work with your team to identify the goals your team would like to achieve in the next two months. Once these goals have been identified, use the table list the major deliverables and related activities that would demonstrate that you achieved these goals. This page offers a sample goals and one deliverable/activity CCI has provided a sample deliverable and activities in the first few rows of the table.

Top three goals for your team to achieve in the next two months:

- 1. Design an education plan to provide foundational training on addiction for all staff
- 2. Get a 30-minute weekly core-team meeting on our calendars
- 3. Identify at least 3 prescribers who want to get x-waiver training

Activity	Activity Lead	Team Members	Start Date	End Date	Notes (optional)
[Deliverable] Assess staff training needs	Angela	Core team	4/15	5/31	
[Activity] Determine whether the clinic has previously assessed staff training needs	Chris	n/a	4/15	4/19	Need to ask office manager what's been done in last 3 years
[Activity] As a team, review findings from capability assessment	Angela	Core team	4/16	4/16	Use 20 min of core team weekly meeting
[Activity] Determine method to assess staff training needs and then conduct assessment	Rich	Core team	4/16	4/19	Angela to propose options at weekly cor team meeting and team decides
Conduct assessment of staff training needs	Michelle	n/a	4/19	5/29	Will likely use Survey Monkey
[Deliverable] Design a 30-minute training for all staff	Rich	Core Team	4/29	5/24	
[Activity] Analyze findings from staff training needs assessment to determine the top needs	Rich	Chris, Michelle	4/29	5/3	Rich reviews findings and shares at weekly core team meeting
[Activity] Review previous trainings to determine if there is existing content that can be re-used	Chris	n/a	5/3	5/10	Chris will let us know if there's anything to be repurposed
[Activity] Post note on ATSH forum to see who can share a draft	Angela	n/a	5/3	5/10	
[Activity] Prepare first draft of training	Angela	Chris	5/10	5/17	Team reviews at weekly core team meeting
[Activity] Finalize slides	Angela	n/a	5/17	5/24	

* We'll spend time completing this later this afternoon

Team Time – Drafting Our Project Plans

Focus on these sections:

- Section 1: Project Overview (Goals, Assumptions)
- ☐ Section 2: Team Roles & Responsibilities
- Section 4: Key Success Factors/Risks

~30 minutes

Data-Driven Improvement

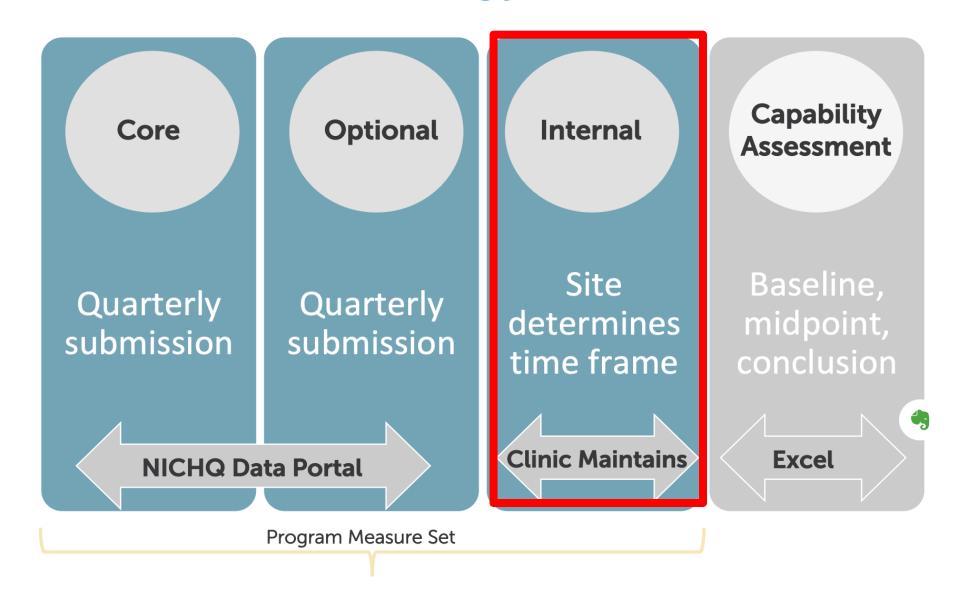
ATSH Project Measures Considerations

For an Improvement Project, What Data do we track?

 At the end of the project: Project data will help you tell your story – did you achieve your goals?

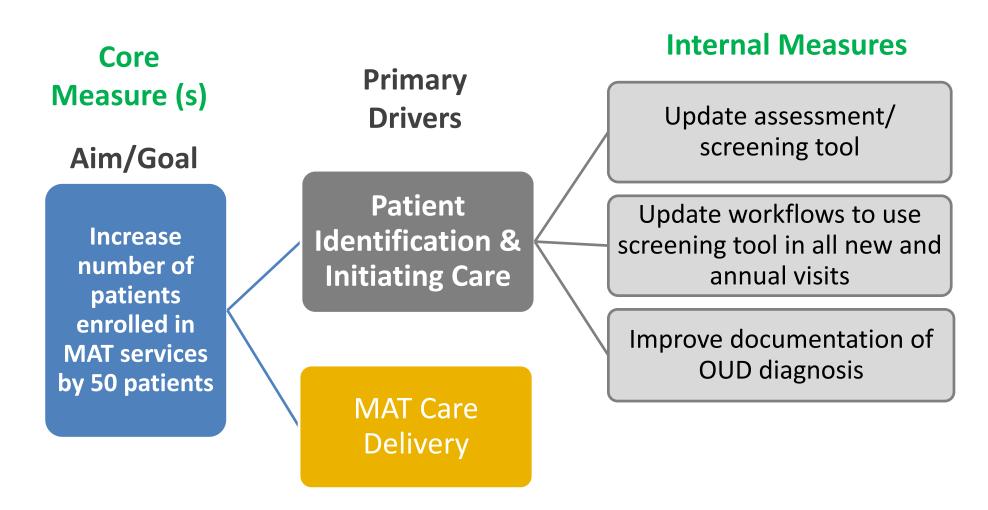
• **During Project:** Project data should also give staff working on the change ideas regular updates about the impact their efforts are having so that they can adjust the change ideas, continue to improve.

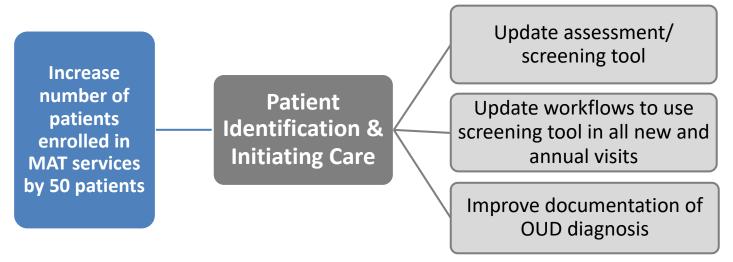
Measurement Strategy: How and When



Internal Performance Measures

Data to Inform our Day-to-Day Project Efforts





Core Measures:

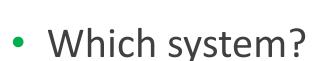
- Total Patients enrolled in MAT services
- Total x-waivered providers

Internal Measures

- % of new patients seen this week that completed the addiction screening form
- % of all patients (new or existing) that completed an addiction screening form in the last 12 months.

Data Collection – How/From Where?





- What query/ parameters?
- Reports pulled by whom?



- How/with what tool(s)?
- Who completes/ enters data? How?
- Who collects?

What are some internal measures you plan to track for your ATSH Project?

 Note: Over the next few weeks as you develop your ATSH Project Plan, consider working with your coach about identifying internal measures to track

Questions?

