Applying the VTF to Your Work

Optimizing Care Teams &
Leveraging Elevate to Train, Learn, Master, Prepare....Upskill

April 11, 2023
America’s Voice for Community Health Care
The National Association of Community Health Centers (NACHC) was founded in 1971 to promote efficient, high quality, comprehensive health care that is accessible, culturally and linguistically competent, community directed, and patient centered for all.
During today’s session:

• **Questions:**
  Throughout the webinar, type your questions in the chat feature. Be sure to select “Everyone”!
  There will be Q&A and discussion at the end.

• **Resources:** If you have a tool or resource to share, let us know in the chat!
Packaging and implementing evidence-based transformational strategies for safety-net providers

Bringing science, knowledge, and innovation to practice

Cheryl Modica
Director, Quality Center

Cassie Lindholm
Deputy Director, Quality Center

Holly Nicholson
Manager, Instructional Design & Learning

Addison Gwinner
Specialist, Quality Center
Agenda:

• Value Transformation Framework
  • Organize Transformation Efforts Using the VTF
  • Leverage Elevate to Train, Learn, Master, Prepare...Upskill
  • Continue VTF Systems Approach: Care Teams, Care Model, Improvement Strategy, & Workforce

• Optimizing Care Teams
  • Optimizing Care Teams
  • CHCACT Case Study: A Systematic Approach to Optimizing Care Team Roles & Responsibilities

• Elevate 2023
  • Health Center Elevate Pathway
  • Elevate ‘University’ Offerings and Tracks
  • Use the VTF Assessment 2.0 to Drive Transformation
The Value Transformation Framework (VTF) is an organizing framework to guide health center systems change.

- **Supports change** in many parts of the health center simultaneously
- **Organizes and distills evidence-based interventions** for discrete parts of the systems called ‘Change Areas’
- **Incorporates evidence, knowledge, tools and resources** relevant for action within different parts of the system, or Change Areas
- **Links health center performance to the Quintuple Aim**
Opportunities to Expand Care Team Skills

National Learning Forum: Guided application of the VTF

Register

Assess
https://reglantern.com/vtf
Ideally 3+ staff complete the VTF Assessment

Engage: Monthly Forum & Supplemental Sessions
registered participants

Access: Online Resources
https://nachc.docebosaas.com/learn/signin

Unlock Workforce Upskill Opportunities!
Elevate 'University' Tracks

Content tailored to health center roles

- Care Management
- Outreach & Enrollment
- Community Health Workers
- Quality Improvement
- Leadership & Staff (Value-Based Care)

Content tailored to health center transformation readiness

Unlock Workforce Upskill Opportunities by completing VTF Assessment!
https://reglantern.com/vtf

Planning Implementing Optimizing
The VTF’s systems approach weaves discussion of all 15 Change Areas continuously throughout the year.
Optimizing Care Teams
WHAT is an optimized care team?

Care Teams

- **Workforce**: Leverage a trained and fully engaged staff to successfully address the health center’s mission and goals, with optimal joy in work.

- **Care Models**: Design care models based on patient risk level to enable patients to be paired with more appropriate care team members and services.

- **Improvement Strategy**: Define vision, goals, and action steps that drive transformation and improved performance.

Utilize groups of staff with different skills to work together to deliver and improve care, offering a wider range of services more efficiently than by a provider alone.

Care teams and the tasks that team members are assigned are developed, based on the needs of the patient population (care models) and the availability of personnel, services, and other resources.
Workforce development: Programs, learning opportunities, and other efforts that allow employees to improve their skills and advance in their career.

Leverage Elevate content tailored to health center roles:
- Care Management
- Outreach & Enrollment
- Community Health Workers
...and more!
WHAT is an optimized care team?

Design care models based on patient risk level to enable patients to be paired with more appropriate care team members and services.

Care Models

- **Low Risk**
  - Focus is keeping patients engaged in the health care system without use of unnecessary services.

- **Rising Risk**
  - Focus is on managing risk factors more than disease conditions.

- **High Risk**
  - Requires structured care management and one-on-one support.

- **Highly Complex**
  - Requires intensive, pro-active care management.
**WHAT is an optimized care team?**

** Improvement Strategy**
Define vision, goals, and action steps that drive transformation and improved performance.

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<thead>
<tr>
<th></th>
<th>Planning</th>
<th>Improvement</th>
<th>Control</th>
<th>Assurance</th>
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<tbody>
<tr>
<td><strong>Focus</strong></td>
<td>• Strategic planning</td>
<td>• Operationalize the strategy</td>
<td>• Measure, monitor, &amp; maintain improvement</td>
<td>Checking performance against external standards</td>
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<td></td>
<td>• Set priorities, goals, and measures</td>
<td>• Test ideas</td>
<td>• Adjust, as needed, to improve performance</td>
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<tr>
<td></td>
<td>• Establish structures &amp; processes</td>
<td>• Scale improvements</td>
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<td><strong>Timeframe</strong></td>
<td>Regular, recurring (e.g., annually)</td>
<td>Over time</td>
<td>Daily work</td>
<td>Scheduled; often driven by external entities</td>
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<td>Often small, rapid bursts</td>
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<td><strong>Tools</strong></td>
<td>• Goals</td>
<td>• Improvement Model (PDSA, Lean, Six Sigma, etc.)</td>
<td>• Visual management to display and track measures</td>
<td>Audit, inspection, gap analysis</td>
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<td></td>
<td>• Leadership endorsement</td>
<td>• Tools (flow charts, pareto charts, A3, etc.)</td>
<td>• Team huddles</td>
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<td>• Job descriptions/roles</td>
<td>• Project Charters</td>
<td>• Escalation processes</td>
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<td></td>
<td>• Measures</td>
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<td>• Improvement model selection</td>
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Utilize groups of staff with different skills to work together to deliver and improve care, offering a wider range of services more efficiently than by a provider alone.

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WHY optimize care teams?

Transitioning to value-based care requires a shift in the way care is delivered:

- Increase capacity for the number of patients served
- ‘Share the Care’ - provide care as a team with varying staff roles providing care to a panel of patients together
- Reallocate tasks and responsibilities so all team members contribute meaningfully and to full capacity
- Leverage opportunities to capture revenue outside of PPS

... All while balancing staffing challenges and limited resources!

Optimizing care teams has been demonstrated to improve the experience and outcomes of primary care for patients, providers, and staff.

HOW do health centers optimize care teams?

STEP 1 Define care standards
STEP 2 Distribute tasks to meet standards and document workflow
STEP 3 Update job descriptions
STEP 4 Train staff
STEP 5 Monitor task performance in dashboards
STEP 6 Hardwire accountability into personnel systems and performance reviews
STEP 7 Educate patients on redesigned care team
Objectives

• Illustrate use of a tool for supporting QA/QI efforts
• Understand the process of applying a swimlane to care teams
• Recognize how to apply a Care Team swimlane
Who We Are & What We Do

Heather Adams
Director of Training & Education

Colleen Rankine
VP, Operations
What is a Swimlane

- Supports systematic change
- Outlines who does what in a process; owned by the participants
- Empowers team by showing opportunities for change
- Engages participants doing the work in making the changes
Before

During

After
Before
Define Optimization Reasons

- Reduce duplication of tasks
- Improve patient experience
- Improve staff experience
- Improve visit cycle times
- Improve clinical measures (immunizations, screenings, etc.)
- Visit type
Create Interest

Leadership
Core Care Team roles
Extended care team role
Define Core Care Team

• Providers
• Medical Assistant
• Nurse*
Define Extended Care team

- Nurse*
- Behavioral Health Consultant/staff
- Dental
- Front-desk/Check-in
- Call-center
- Care Coordinator/CHW
- Pharmacy staff
Define the Current State

- Determine “type of visit”
- Define the “Start” and “End’ of the visit
- Determine the care team participants to invite
- Request participants create a list the tasks they complete
  - Distribute “Team Based Care Planning Worksheet”
Role of the Facilitator

facilitator noun

facil·i·ta·tor \fə-ˈsi-lə-, tə-\-

: someone or something that facilitates something

especially : someone who helps to bring about an outcome (such as learning, productivity, or communication) by providing indirect or unobtrusive assistance, guidance, or supervision

the workshop's facilitator kept discussion flowing smoothly

https://www.merriam-webster.com/dictionary/facilitator
Tips for Successful Session

- Review the submissions
- Date & time: 90-min time frame
- Location: Long flat wall, free from interruptions
- Food and beverage
Facilitating the First Session

- Senior Leadership/ C-Suite Support
- Goals & Objectives
- Establish the “garden plot”
- Document one task per sticky note
- Place the tasks by role in the order they take place
- Make note of duplicative
Facilitator Points

- Who “owns” a task
- Common tasks vs occasional tasks
- Reminders of sharing tasks associated to a specific type of visit
- Seek agreement/consensus on the “Current State” of tasks
- Seek agreement/consensus on “Start and Finish of the visit"
After
Go to Gemba
Facilitate the Future State Session

• Bring same care Team members back together
• Review the current state swimlane
• Discuss how it can be improved
  • Refer to tasks identified as an opportunity for improvement
  • Garden plot items
Tips for Success

• Document recommendations for improvement
• Share the recommendations for improvements
• Start with small changes
• A combination of QA and QI
Health Center Experience

- Implemented huddles
- Interdisciplinary team meetings for patients at high-risk
- Clarification of external specialty referral process
- Role clarification
- SDOH screening improvement
- Care coordination role & responsibilities
Discussion
2023 Elevate Calls

Monthly Forums: 2nd Tuesday of the month, 1-2 pm ET

January 10th
February 14th
March 14th
April 11th
May 9th
June 13th
July 11th
August: Summer break, no Elevate call this month
September 12th
October 10th
November 14th
December 12th: Year in Review

Supplemental Sessions

Outreach & Enrollment Learning Community
6-part series, March – June (filled)

National Diabetes Prevention Program & NACHC’s Healthy Together Project
April 6th, 12-1 pm ET. Access recording (here)

Brain Health
3- part series: May 3rd, 17th, 31st, 1-2 pm ET. Register here

Coming soon...opportunities around care management, Community Health Workers, value-based care and more!
Elevate 2023: Health Center Pathway

January

Identify Transformation Team
Register for Elevate
- Leadership support
- Interdisciplinary (QI, clinical, finance, HIT)
- Care team member engagement

Complete the VTF Assessment 2.0
- Assess progress on transformation continuum
- Identify areas for focused improvement

Set Goals Based on VTF Assessment Results
Incorporate into Health Center QI Plan
- Which Change Areas are most in need of improvement?
- Opportunities to leverage other health center initiatives?

December

Leverage the VTF
- Organize transformation efforts using VTF

Access Elevate Resources
- Attend monthly Elevate learning forums
- Attend Supplemental sessions
- Participate in Upskill opportunities
- Apply evidence-based Action Guides
- Access eLearning modules & microlearnings
- Engage with peers nationally

Continue Transformation
Reassess; VTF Assessment 2.0
- Measure transformation progress
- Identify areas for focused improvement
VTF Assessment: Use To Drive Transformation

VTF Assessment 2.0

✓ Still only 15 questions – 1 for each Change Area
✓ Refreshed to reflect current state of value-based care

✓ Assess organizational progress in 15 areas of systems change important to value transformation.
✓ Recommended that 3 or more health center staff complete the assessment to get a balanced perspective of organizational progress in areas of systems change.
Provide Us Feedback
Next Monthly Forum Call:

May 9, 2023
1:00 – 2:00 pm ET

SHARE YOUR FEEDBACK
Don’t forget! Let us know what you thought about today’s session.

FOR MORE INFORMATION CONTACT:
qualitycenter@nachc.org

Cheryl Modica
Director, Quality Center
National Association of Community Health Centers
cmodica@nachc.org
301.310.2250
Together, our voices elevate all.

The Quality Center Team
Cheryl Modica, Cassie Lindholm, Holly Nicholson, & Addison Gwinner
qualitycenter@nachc.org