**Practice Transformation Initiative Quarterly Convening │ August 28, 2018**

**Sustainability Planning Workbook**

Use this workbook to guide your team’s time creating a plan for sustainability of the PTI work within your organization. Key components of a sustainability plan are below with examples offered for each section. As a team, talk about and record what pieces of the sustainability plan you may already have and what you need to develop or investigate.

**What Will Be Sustained**

*Question to consider: What PTI work that we currently do will continue beyond 2019?*

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| What we already have/know:What needs to be developed or investigated: |

Examples might include: *Our team of 3 practice facilitators will continue engaging our high and medium tier practices in transformation work / Our organization will implement a patient activation tool with 30 practices / Our organization will implement a data portal for practices to see monthly performance on quality measures / Our organization will implement team-based care in 25 practices including the use of standing orders for diabetes and hypertension care*

**Work to Date**

*Questions to consider: What quantifiable progress has been made? What qualitative data can we share about progress? What are the successes and bright spots achieved that could be spread across the organization and practices? What changes at the organization level have been successful?*

For this section: Go into the PTI data results portal and look at how your organization has performed on each measure. If there’s been improvement, how many patients does that represent that can be stated as part of the progress made by your organization? Also, think about all the performance stories you have developed for PTI over the last 2 years. Which are most powerful and could be updated or developed further? Might you catalogue the performance stories and add more detail to build the case for the impact of the work? Draw on resources related to leading change, communication, and storytelling to make the description of the work you’ve done more powerful.

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| What we already have/know:What needs to be developed or investigated: |

Examples might include: *Across our practices, the diabetes 2 tests rate improved by 38% / Within 25 practices, ED visits were reduced by 18% / Readmission rates in 1 practice went from 15% to 4% in 1 year / 30 practices now using web portal to refer patient for diabetes eye exams / We have 20 highly engaged practices working with facilitators now implementing standing orders / 45 practices improved data skills by working with Practice Facilitators*

**Potential Impact (the Business Case for Practice Transformation)**

Building a business case, or ROI, for your work can be done by using your best performing practices to quantify the *potential* of the impact of this work based on the highest achievers and what it could equate to if more or all practices were performing at this level. For this section, use the worksheet handout specific to your organization titled “Developing a Business Case for Practice Transformation” to practice a method for calculating potential ROI for one of the PTI measures. In the space below, write out a statement about potential for your organization’s practices reducing the number of patients with poorly managed diabetes and associated cost savings. Also write any other ideas you have about how you can make the business case for continuing the Practice Transformation work.

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| Potential impact on patients and cost savings if all practices in my organization performed like the top quartile:Other measures we want to perform this analysis on, or other ideas for making the business case in our organization: |

**Resources Needed**

*Questions to consider: What do you currently have and what else is needed to continue the work you’ve identified? How should the work be spread and/or deepened (if applicable) within your organization and what might you need in order to do that?*

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| What we already have/know:What needs to be developed or investigated: |

Examples might include: *We have 2.5 coaching FTEs but need 4.5 FTEs in order to continue working with the 85 high and medium priority practices / We do not have a skills training to deepen skills of existing practice coaches nor a program for onboarding new coaches / We want to expand practice facilitation to the 2 additional IPAs in our organization / We want to bring the team-based care model to 10 additional sites / We have 1 Practice Facilitator funded with the PTI monies and need to identify how their position will be paid for post-2019 / We need to produce performance data for our practices / We want to continue a streamlined version of the practice assessment.*

**Operational Integration**

*Questions to consider: Who (people and department) will own the work in your organization? Who will champion the work? What infrastructure pieces need to be developed or adjusted to formalize accountabilities for the work? How will the costs and budgeting be integrated into the financial processes of the organization?*

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| What we already have/know:What needs to be developed or investigated: |

Examples might include: *Our VP of Quality Management will have direct line accountabilities / We will identify 2 Clinical Champions from high performing practices in each of our 2 regions / Practice Facilitators will be members of the Quality Department, reporting up to the Chief Medical Officer / Practice Facilitator competencies and standard job descriptions will be written / Department costs include 2.5 practice facilitator FTEs, trainings, laptops / Budget line items to be included in overall Quality Department budget / Our ACE Coach will become the master coach trainer for the organization and supervise other coaches*

**Communication**

*Questions to consider: What is the communication strategy for the next phase after PTI ends? How will you recognize high performing practices and the progress made in the program? What can you propose to keep leadership regularly updated?*

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| What we already have/know:What needs to be developed or investigated: |

Examples might include: *Org-wide email describing what will happen post-PTI / Quarterly meetings with senior leadership using standard reporting template / Internal bright spot visits to high performing practices twice per year / Highlighting practices in newsletters / Report-out during quarterly provider meetings / Our own version of the Spirit of Transformation award and Practice Trading Cards / Presenting at state and national conferences to bring visibility to our successes.*

**Future Performance Goals**

An important component of a sustainability plan, but you’ve done enough for now – great job! Plan to revisit this section with your Improvement Advisor and during the next PTI convening.