Training the Next Generation:
Best Practices for Gaining Leadership Support and Implementation Planning

Thursday December 7th, 2023
3:30-4:30pm Eastern | 12:30-1:30pm Pacific

1

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National Training and Technical Assistance Partners
Clinical Workforce Development

Provides free training and technical assistance to health centers across the nation through national webinars, learning collaboratives, activity sessions, trainings, research, publications, etc.

Team-Based Care
- Fundamentals of Comprehensive Care
- Advancing Team-Based Care

Training the Next Generation
- Postgraduate Residency and Fellowship Training
- Health Professions Training

Emerging Issue
- HIV Prevention

Advancing Health Equity

Preparedness for Emergencies and Environmental Impacts on Health

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EHCI Program Manager

Objectives

- Understand how to communicate health professions education and training (HP-ET) throughout the organization

- Increase knowledge and confidence about tools, resources, and emerging best practices for implementation planning

- Share first-hand experiences with implementation strategies and gaining leadership support

Introductions

Northwest Regional Primary Care Association (NWRPCA) is membership-driven organization that serves community and migrant health centers (C/MHCs) in Alaska, Idaho, Oregon, and Washington (federal Region X). Founded in 1983, NWRPCA offers a range of programs and services to support and strengthen C/MHCs in the Northwest. We work to ensure equal access, regardless of one's financial or insurance status, to primary and preventive health care for all residents living in the region.

Moses Weitzman Health System Affiliates

Community Health Center, Inc.

Locations and Service Sites in Connecticut

Legend:
- ● Towns with CHC Locations
- ○ Towns with CHC Mobile Services
- ● Child Guidance Center of Southern CT
- Where CHC Patients Live
- Medical
- Dental/Mobile Dental
- Behavioral Health
- School-Based Health Care Services
- Wherever You Are Homeless Services
- Urgent Care

Map locations: Enfield, Stafford Springs, Windsor Locks, East Windsor, Ashford, Winsted, Windsor, Bloomfield, Plainville, Hartford, Willimantic, Bristol, New Britain, Portland, Waterbury, Meriden, Middletown, East Haddam, Wallingford, Groton, Hamden, North Haven, New London, Pawcatuck, Danbury, Bethel, Ansonia, Westbrook, Stonington, East Haven, Clinton, Waterford, Mystic, Branford, Old Saybrook, Stratford, Stamford, Norwalk, Shippan Avenue, West Broad Street, Greenwich

CHC Profile:
- ◉ Founded: **May 1, 1972**
- ◉ Staff: **~1,200**
- ◉ Total Patients Served: **102,275**
- ◉ Clinical Sites across CT: **19**
- ◉ SBHCs across CT: **180+**
- ◉ Students & Residents/year: **390**
- ◉ Three Foundational Pillars:
  1. Clinical Excellence
  2. Research & Development
  3. Training the Next Generation

MOSES/WEITZMAN Health System

Refresh – Investing in Workforce Training

Background

- April 27th, 2023: Training the Next Generation: Investing in Workforce Training
  - This webinar discussed how to build the business case for investing in health professions education and training (HP-ET). The webinar also guided participants in understanding how to assess readiness and implement HP-ET programs utilizing tools and best practices.
  - Recording & Slides
- Prior to this webinar, CHC/NWRPCA launched a survey to understand the top priority challenges among health centers with HP-ET.

Survey Responses

- Number of Survey Respondents – 37
  - 7 respondent within the organizations C-Suite
  - **Role Type Breakdown**: 51% Administrative; 30% Clinical; 19% Not Available

Top 3 Priority Challenges	Describe how learning about workforce and HP-ET programs could benefit your organization and/or your role within the organization:	What takeaways would you like from a webinar on workforce and health professions education training programs?
• Capacity (e.g. Staffing Shortage, Lack of Willing Preceptors) • Funding • Time for coordination and planning of implementation	• Understanding the value and the business case of HP-ET • Staffing Shortages	• HPT Programs • Return on Investment

# Why is workforce development planning so critical to community health centers?

➢HRSA High Priority

➢Operating Challenges

➢High demand for primary care workforce

➢Access

Does strategic workforce development planning make business sense?

Definitely! Qualitatively:

- Fully staffed clinic, particularly with a stable workforce = Increased patient satisfaction

- "Halo effect" of HP-ET – public perception that teaching institutions are higher quality and thus more highly regarded in their communities.

- Local experience and institutional history/patient history/relationships walk out the door with employees

- The "Multiplier Effect" – Engaging employees leads to higher employee satisfaction which in turn increases retention and supports recruitment

Developing a Clinical Workforce

Student

Clinical Placement

Postgraduate Resident

Full-Time Provider

Preceptor/ Faculty
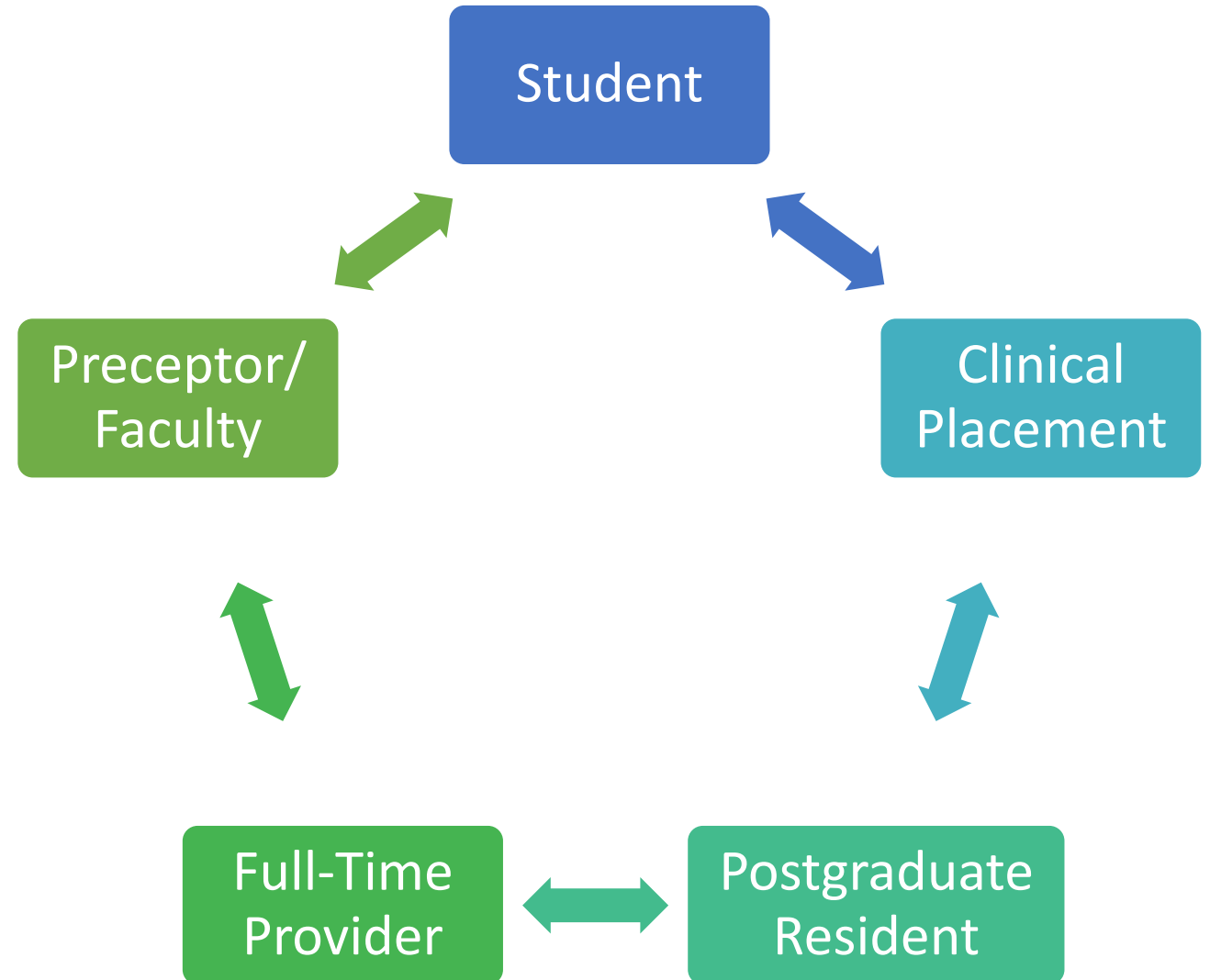
Communication Planning and Stakeholder Analysis

Organization Communication and Education

Why is the organization launching a HP-ET program?

What does the HP-ET program look like?

How will the HP-ET program intersect with your work?

Stakeholder Analysis

Stakeholder

- Has something to gain/lose through outcomes of the project
- Has a powerful bearing on outcome of the project
- Is affected by the project

Stakeholder Analysis

- Define ways to engage stakeholders to maximize positive impact
- Identify who needs to know about the project
- Develop how the project should be presented/framed
- Assess opinions/thoughts about the project

Stakeholder Grid

Interest

Measures to what degree the stakeholder is likely to be affected by the project and what degree of interest or concern they have in or about it

Power

Measures the influence they have over the project and to what degree they can help achieve or block the desired change

Figure 3.2: Stakeholder Analysis. Adapted from Mendelow's Stakeholder Power-Interest Matrix (1991)
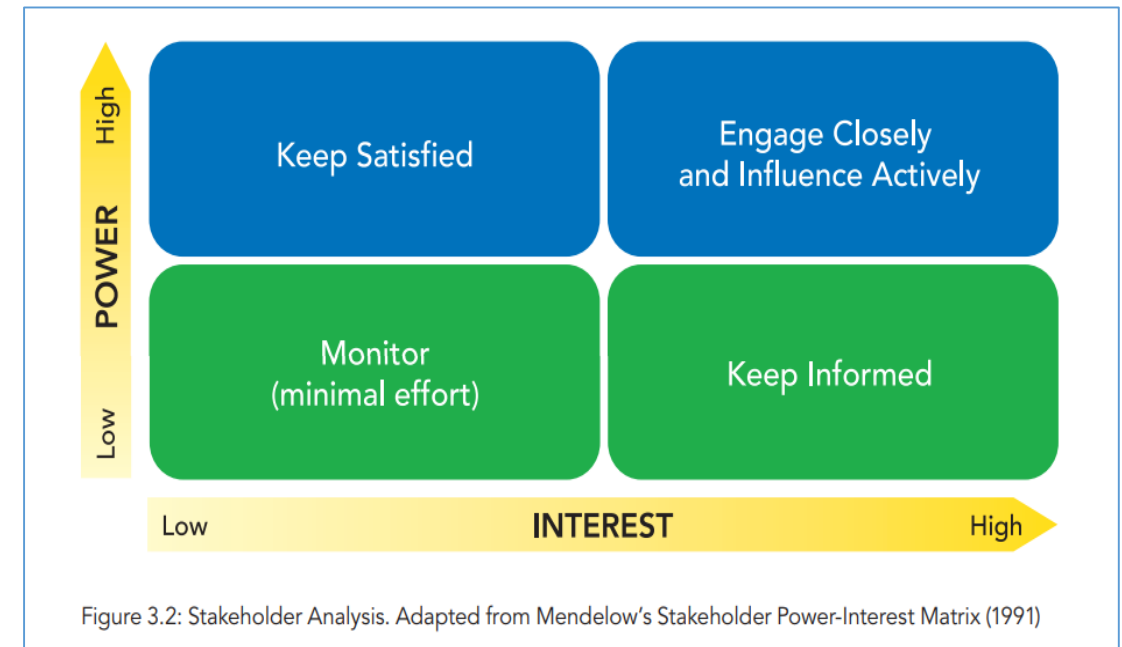
Stakeholders with high influence and interests aligned with the project, are the people it is important to fully engage and bring on board.

Stakeholder Communication Plan

Communication Plan					
Stakeholder	Objectives	Message(s)	Media & Methods	Timing & Frequency	Who/When/Where

Figure 3.4: Stakeholder Communication Plan

Flinter, M., & Bamrick, K. (2017). Training the next generation: Residency and fellowship programs for nurse practitioners in Community Health Centers. Retrieved from https://www.weitzmaninstitute.org/sites/default/files/NPResidencyBook/NPResidencyBook.pdf

- Who are your key stakeholders?
- What are you objectives in communicating with them about the project?

- What are they key messages you want to communicate?
- How will it be communicated?
- When and how often will you communicate?

Upcoming Activity Session:
Effective Communication Strategies for Building Leadership Support for HP-ET Programs

➢ Date: Tuesday, December 12, 2023 3:30-4:30pm ET / 12:30-1:30pm PT

➢ This interactive activity session will utilize a template for conducting a stakeholder analysis and developing a communication plan.
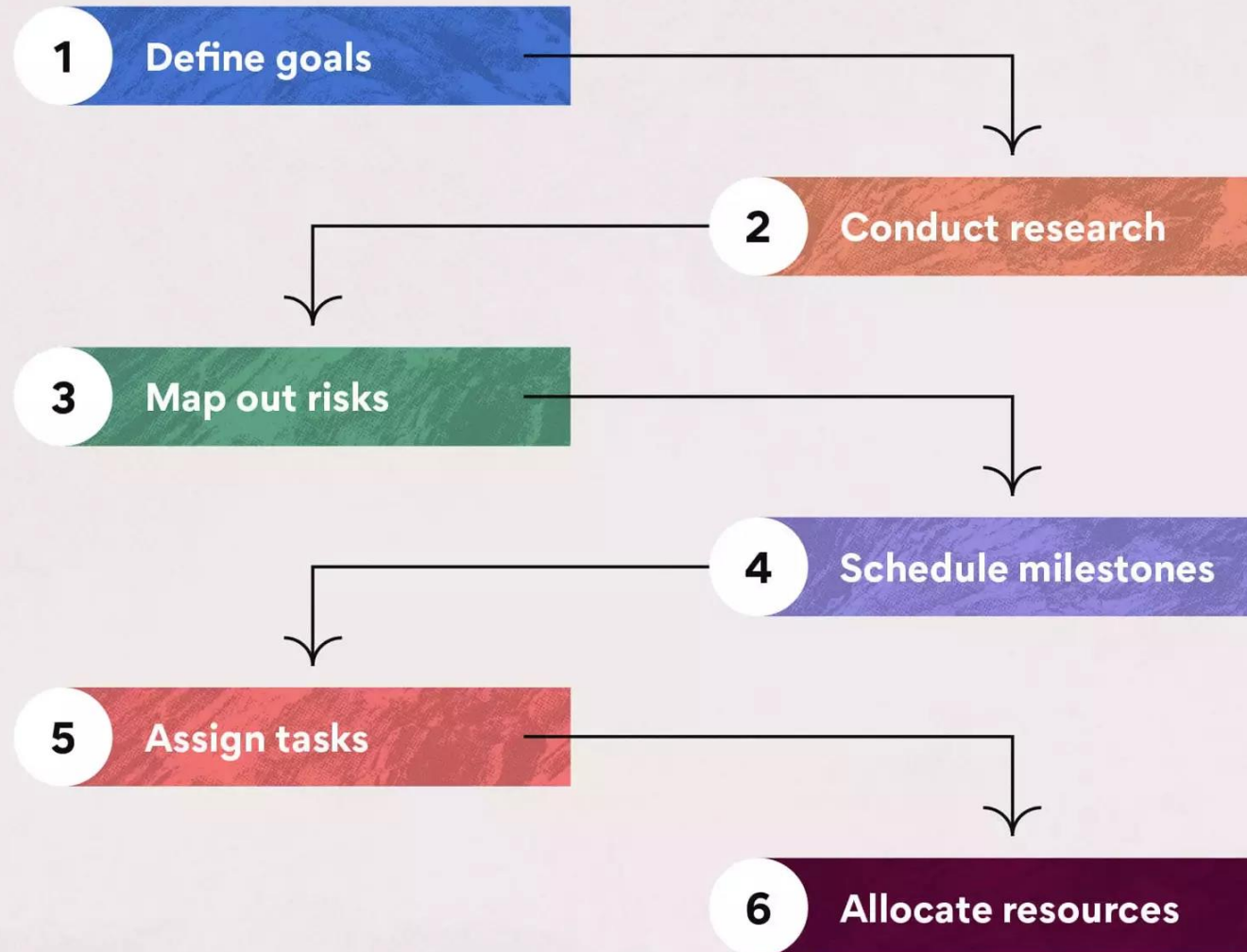
➢ Registration Link

Implementation Planning

Implementation Planning

- What is the purpose of an implementation plan?

- An implementation plan is a document that outlines the steps your team should take to accomplish a shared goal or initiative. Implementation planning is the counterpart to a [strategic plan](#). If the strategic plan details what strategies you will use to hit a specific goal, the implementation plan is the step-by-step guide for how those goals will be achieved.

- The purpose of an implementation plan is to ensure that your team can answer the who, what, when, how, and why of a project before moving into the execution phase. In simple terms, it's the action plan that turns your strategy into specific tasks.

How to develop an implementation plan

1 Define goals

2 Conduct research

3 Map out risks

4 Schedule milestones

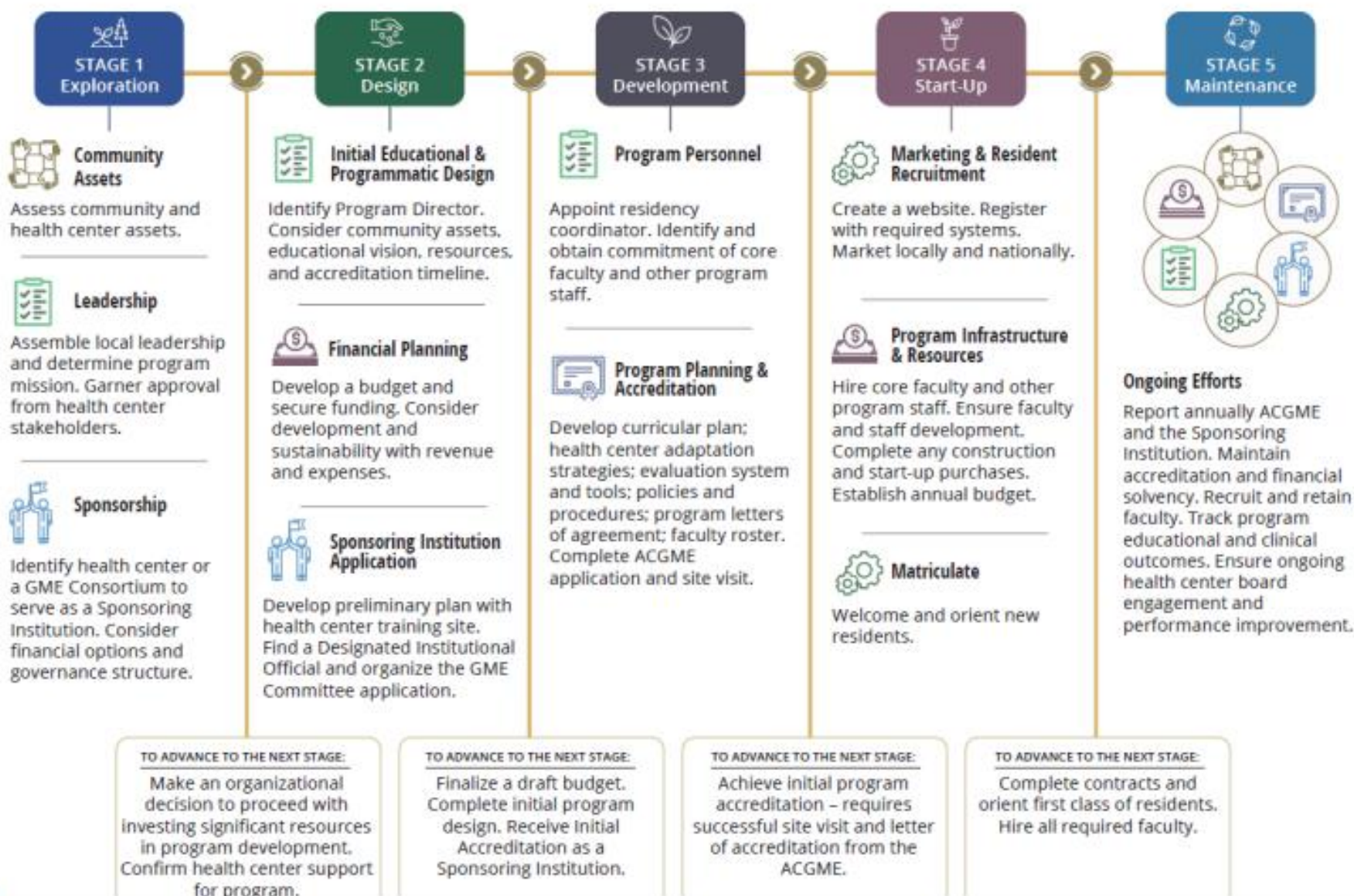**5** Assign tasks

6 Allocate resources

Benefits of having an implementation plan

• There are many benefits to implementation planning, with the top benefit being an increased chance of project success. Implementing a project plan creates a roadmap for executing your project so you can prevent issues from occurring.

• Other benefits to having an implementation plan include:

• Improved communication between team members and key stakeholders

• Better organization and management of resources

• Increased accountability for everyone involved in the project

• More structured project timeline and daily workflow

• Easier collaboration between team members

• Going straight into the execution phase without an implementation plan may feel like walking on stage to give a speech without knowing what you're going to say. Preparation is key for top-notch performance.

THCGME.org

Roadmap for Teaching Health Center
Program Development

Roadmap for THC Program Development

STAGE 1 Exploration	STAGE 2 Design	STAGE 3 Development	STAGE 4 Start-Up	STAGE 5 Maintenance

STAGE 1 — Exploration

Community Assets
Assess community and health center assets.

Leadership
Assemble local leadership and determine program mission. Garner approval from health center stakeholders.

Sponsorship
Identify health center or a GME Consortium to serve as a Sponsoring Institution. Consider financial options and governance structure.

STAGE 2 — Design

Initial Educational & Programmatic Design
Identify Program Director. Consider community assets, educational vision, resources, and accreditation timeline.

Financial Planning
Develop a budget and secure funding. Consider development and sustainability with revenue and expenses.

Sponsoring Institution Application
Develop preliminary plan with health center training site. Find a Designated Institutional Official and organize the GME Committee application.

STAGE 3 — Development

Program Personnel
Appoint residency coordinator. Identify and obtain commitment of core faculty and other program staff.

Program Planning & Accreditation
Develop curricular plan; health center adaptation strategies; evaluation system and tools; policies and procedures; program letters of agreement; faculty roster. Complete ACGME application and site visit.

STAGE 4 — Start-Up

Marketing & Resident Recruitment
Create a website. Register with required systems. Market locally and nationally.

Program Infrastructure & Resources
Hire core faculty and other program staff. Ensure faculty and staff development. Complete any construction and start-up purchases. Establish annual budget.

Matriculate
Welcome and orient new residents.

STAGE 5 — Maintenance

Ongoing Efforts
Report annually ACGME and the Sponsoring Institution. Maintain accreditation and financial solvency. Recruit and retain faculty. Track program educational and clinical outcomes. Ensure ongoing health center board engagement and performance improvement.

TO ADVANCE TO THE NEXT STAGE:
Make an organizational decision to proceed with investing significant resources in program development. Confirm health center support for program.

TO ADVANCE TO THE NEXT STAGE:
Finalize a draft budget. Complete initial program design. Receive Initial Accreditation as a Sponsoring Institution.

TO ADVANCE TO THE NEXT STAGE:
Achieve initial program accreditation – requires successful site visit and letter of accreditation from the ACGME.

TO ADVANCE TO THE NEXT STAGE:
Complete contracts and orient first class of residents. Hire all required faculty.

STAGE 1: EXPLORATION

Goal 1.1	Complete community asset and capacity inventory.
Goal 1.2	Assemble a local leadership team.
Goal 1.3	Confirm health center support for program and determine governance structure, engaging other potential financial stakeholders if relevant.
Goal 1.4	Make an organizational decision to proceed with investing significant resources in program development.

STAGE 2: DESIGN

Goal 2.1	Appoint a Program Director (PD) or a PD in development.
Goal 2.2.	Complete initial program design.
Goal 2.3	Develop Sponsoring Institutional (SI) Application (if the SI is not already accredited).
Goal 2.4	Using initial program design, complete a detailed pro forma for all phases of program development and sustainability with revenues and expenses.
Goal 2.5	In light of the detailed pro forma, refine program design to include final curriculum outline and site mapping.
Goal 2.6	Submit SI application (if the SI is not already accredited).

31

STAGE 3: DEVELOPMENT

Goal 3.1	Identify key staff support and core faculty members.
Goal 3.2	Complete specific program planning.
Goal 3.3	Submit ACGME Application.
Goal 3.4	Complete ACGME site visit.
Goal 3.5	Finalize financial plan for the program.
Goal 3.6	Obtain ACGME accreditation.

STAGE 4: START-UP

Goal 4.1	Develop plan for resident marketing and recruitment.
Goal 4.2	Complete program infrastructure.
Goal 4.3	Establish annual budget (based on earlier pro forma).
Goal 4.4	Fill program positions through the NRMP Match.
Goal 4.5	Matriculate and orient initial class of residents.

STAGE 5: MAINTENANCE

Goal 5.1	Annually recruit excellent residents.
Goal 5.2	Maintain accreditation.
Goal 5.3	Maintain financial solvency; budget and reconcile budget annually.
Goal 5.4	Recruit and retain faculty.
Goal 5.5	Track program educational and clinical outcomes and ensure ongoing performance improvement, adaptability, and resilience.
Goal 5.6	Contribute to the community of practice in THCs through dissemination of innovations and peer consultation.

Implementation Strategies and Gaining Leadership Support

The Somewhat Mysterious Cost of Staff Turnover

- Recruitment costs, e.g., advertising, interviewing, screening, and hiring
- Onboarding costs, e.g., training and management time
- Training costs can average 10% to 20% of an employee's salary
- Decreased productivity before hiring and during training
- Team culture and morale take a hit
- Potential for increased errors with newer staff
- Possible lost institutional knowledge

We Can't NOT Invest

Taking Action

Assess Readiness

Design & Make the Case

Implement

Evaluate

Redesign, if needed

Develop a Common Goal:
Building an Equitable Workforce

➢ Bringing together employer & training partners in a workforce solution for medically underserved communities

➢ Breaking down employment and education barriers through asynchronous learning and community-based experience

➢ Helping employers recruit students that reflect their community in a Grow Your Own (GYO) approach

➢ Creating a positive social and financial return on investment
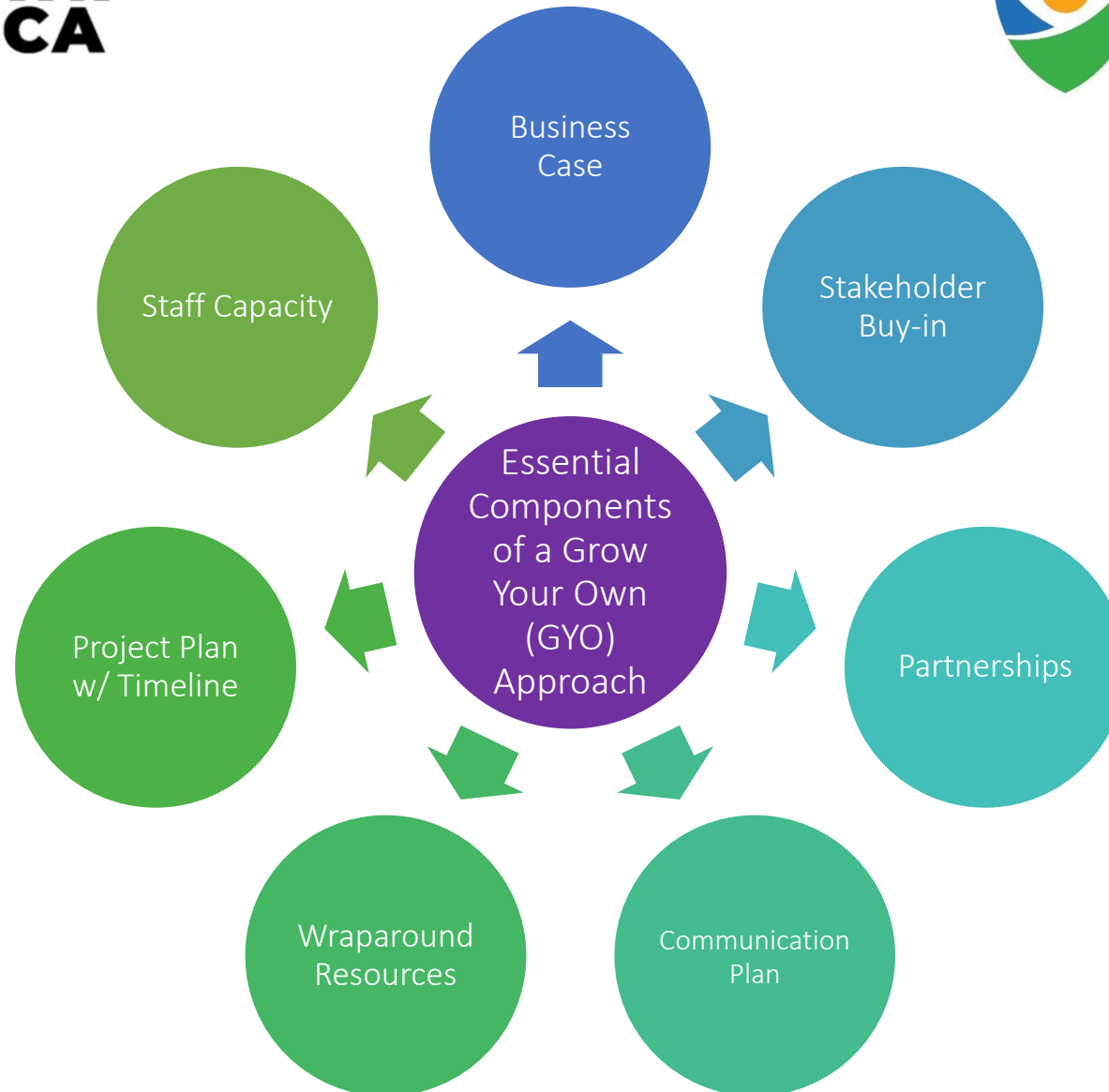
Components Within a GYO Framework [1]

DESIGN	Establish Partnerships	Outline Program Features	Recruit Students
IMPLEMENTATION	Provide Academic Supports	Provide Financial Supports	Provide Social Supports
EVALUATION	Evaluate Recruitment Strategies and Program Features	Evaluate Implementation Fidelity	Evaluate Impact and Success
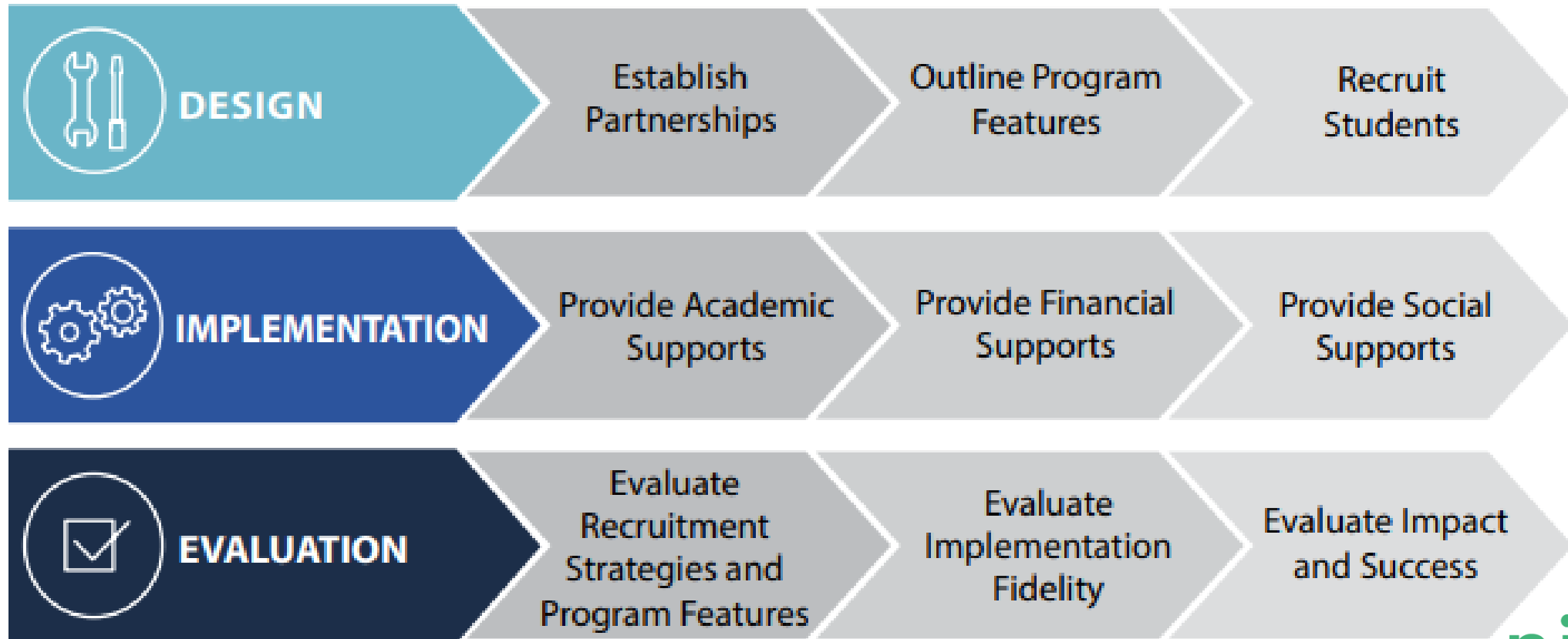
Important GYO Program Drivers

High Quality Training

Affordability

Accessibility

Workforce readiness

Pros of GYO

| Trained staff | Filling vacancies | Credential preparation | Future preceptors | Internal growth opportunities (e.g. ladder programs) | Investment in your staff |

The Design Phase

Identify goals

Determine capacity

Develop a timeline

Gather and review data

Make business case to gather stakeholder buy-in

Identify and collaborate with partners

The Design Phase, cont'd

Align with equity & inclusion goals

Identify supports

Draft service commitment agreement, if required

Develop recruitment plan

Budget financial support, if available

Identify key staff
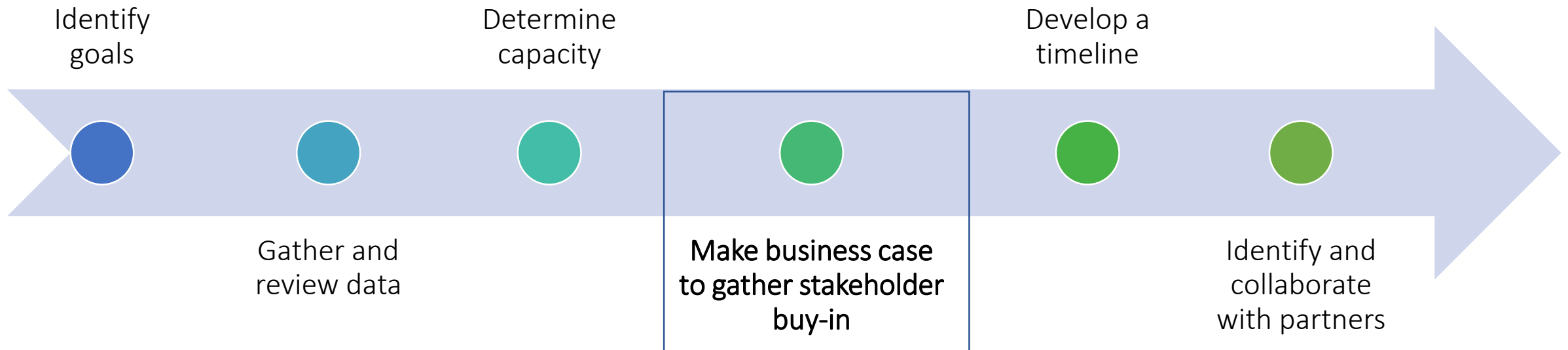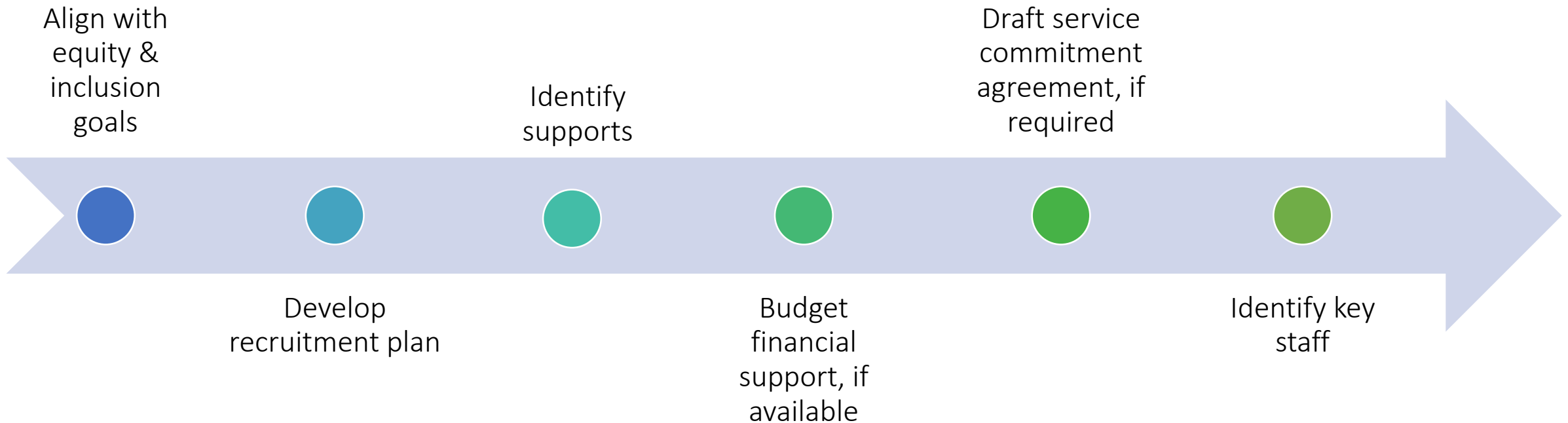
Building the Business Case:
Lead with the Need

✓ Describe the problem, e.g., workforce pipeline

✓ Talk about why NOW is the time

✓ Outline a feasible GYO approach

✓ Forecast high-level costs and time investment & ROI potential

✓ Describe possible risks/threats

✓ Provide a short, concise summary to grab attention

SmartSheet Examples

ONE PAGE BUSINESS CASE TEMPLATE

DATE	
SUBMITTED BY	
TITLE / ROLE	

LOGO

THE PROJECT
In bullet points, describe the problem this project aims to solve or the opportunity it aims to develop.

THE HISTORY
In bullet points, describe the current situation.

LIMITATIONS
List what could prevent the success of the project, such as the need for expensive equipment, bad weather, lack of special training, etc.

APPROACH
List what is needed to complete the project.

BENEFITS
In bullet points, list the benefits that this project will bring to the organization.

ONE PAGE BUSINESS PLAN FOR A SERVICE BUSINESS TEMPLATE

BUSINESS OVERVIEW

OUR VISION	
OUR MISSION	
THE SERVICE WE PROVIDE	

MARKET ANALYSIS

WHO WE ARE TARGETING	
THE PROBLEM WE ARE SOLVING	
OUR COMPETITORS	
OUR COMPETITIVE ADVANTAGE	

MARKETING AND SALES PLAN

MARKETING CHANNELS	
MARKETING MATERIALS	
CUSTOMER INCENTIVES (REFERRALS, DISCOUNTS, ETC.)	
STAFF REQUIREMENTS/ TRAINING	

KEY OBJECTIVES AND SUCCESS METRICS

OBJECTIVES WE PLAN TO ACHIEVE IN A GIVEN TIMEFRAME AND HOW THEY'LL BE MEASURED

1	
2	
3	

Timeline of Milestones

Start 2/08
Milestone 2 02/16
Milestone 4 02/23
Milestone 6 03/03

Milestone 1 02/11
Milestone 3 02/20
Milestone 5 03/01

The Implementation Phase

- May include:
  - ➤ Developmental education
  - ➤ Onboarding/orientation
  - ➤ Academic supports
  - ➤ Financial planning
  - ➤ Social supports
  - ➤ Supplies
  - ➤ Written agreements
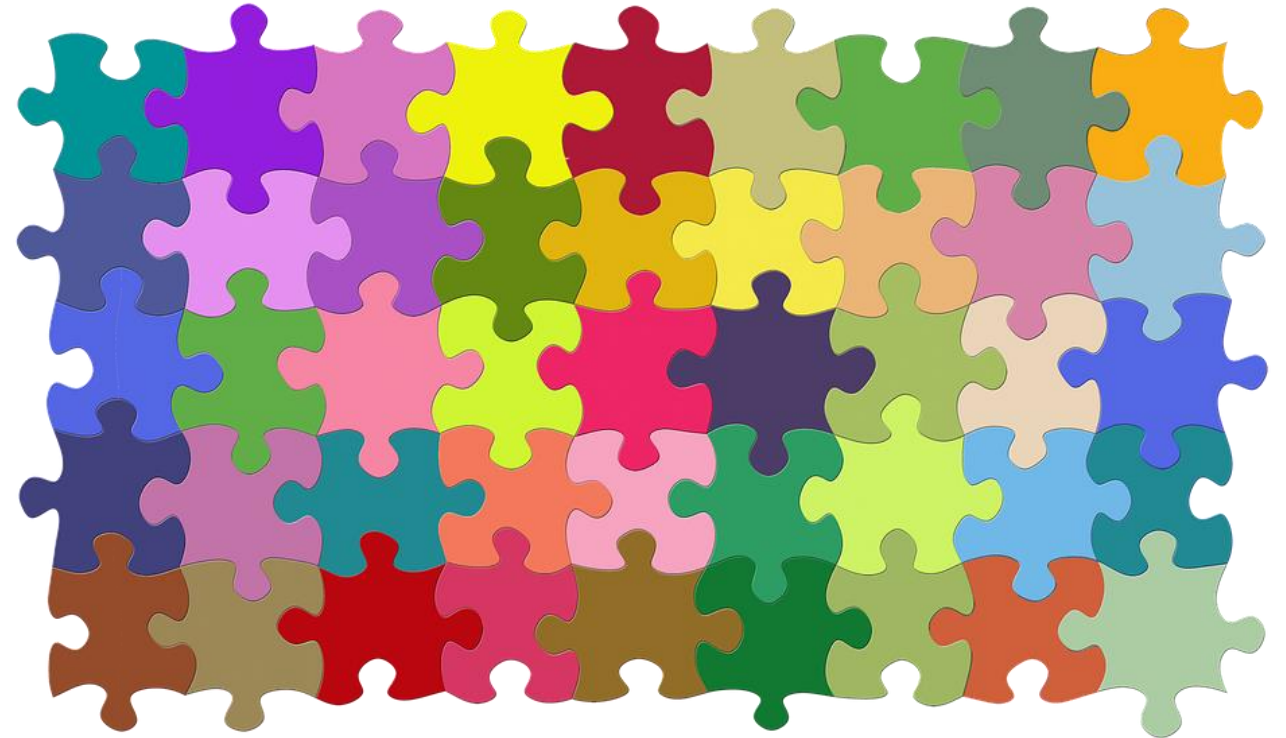
Pitfalls to Avoid

- Being unrealistic with your timeline

- Limited or no communication with key stakeholders across the organization and at all levels

- Leadership buy-in without clinical staff buy-in

- Lack of preparation for backfilling or staffing needs

- No planning for funding sources

- Clear goals and objectives not outlined; inability to evaluate initiatives or analyze ROI

The Evaluation Phase

Start with the end in mind:

- Competency checks

- Feedback from trainees & implementation team

- Use of supports

- Completion & graduation rates

- Credential exam pass rates

- Staff retention

Potential Funding Sources

- Title IV, e.g., Pell grants

- Apprenticeship grants

- Foundations

- Primary Care Associations

- Workforce Development Agencies (e.g. individual training vouchers)

- Health center budgets

How GYO Partnerships Can Help

Unique insights and ideas	Targeted recruitment	Messaging
Implementation	Student services	Funding
	...and More	

Example partners might include:

- Community colleges / educational programs who can help recruit and train

- Community-based organizations who can link to new audiences

- Minority serving institutions as trusted advocates in the community

- Private foundations that can financially support students or employers

Questions?

Wrap-Up

Health Professions Student Training Learning Collaborative

- Free six-month participatory experience designed to support health centers in supporting participating organizations in establishing a sustainable and effective model for training students.

- Outcomes of the learning collaborative:
  - Standardized the learner experience across all departments and promoted interdisciplinary learning across the health center (e.g. uniform application and onboarding process, IT system access).
  - Created tools to evaluate student capacity and effectiveness of the training program.
  - Developed a standardized affiliation agreement template for academic partners

- For more information/questions, please reach out to Meaghan Angers (angersm@mwhs1.com) or click here!

Training the Next Generation

- **Postgraduate Residency and Fellowship Training**
- **Health Professions Training**

Comprehensive & Team-Based Care Learning Collaborative

- Free eight-month participatory experience designed to provide knowledge, tools, and coaching to support health centers and look-alikes in improving a UDS measures by implementing a model of team-based care

- Outcomes of the learning collaborative:
  – Identified a clinical team to work on a quality improvement project
  – Improved UDS measures, such as hyptertension, cancer screenings, etc.
  – Implemented pre-visit planning and morning huddles
  – Integrated behavioral health with warm welcomes/handoffs

- For more information/questions, please reach out to Meaghan Angers (angersm@mwhs1.com) or click here!

Team-Based Care

- **Fundamentals of Comprehensive Care**
- **Advancing Team-Based Care**

Explore more resources!

National Learning Library:
Resources for Clinical Workforce Development

https://www.weitzmaninstitute.org/ncaresources

Health Center
Resource Clearinghouse

https://www.healthcenterinfo.org/
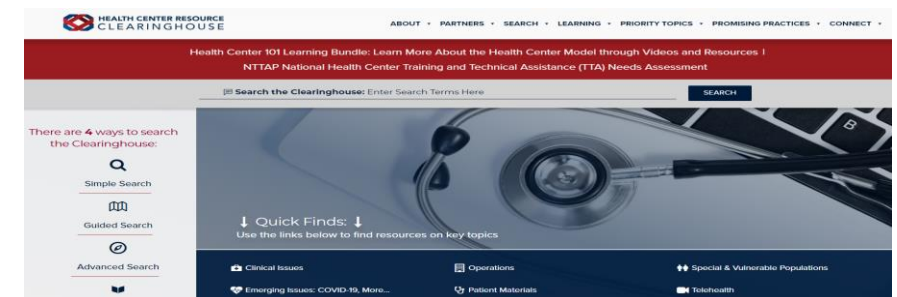
Contact Information

For information on future webinars, activity sessions, and learning collaboratives: please reach out to nca@chc1.com or visit https://www.chc1.com/nca

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