

Welcome!



# Attending a PIP Rally?

Cheerleading for Change, Process & Program Improvement

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## CME and CE Information

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# Session Objective

Formulate, develop, and evaluate an action plan for school-based health center performance improvement utilizing (1) principles of change management, (2) clinical/business operations data analysis, and (3) process improvement to **meet key performance indicators**, to **drive expected outcomes** for care delivery, and to **sustain excellence** in care delivery.





# Odessa Brown Children's Clinic (OBCC) Background & History



# OBCC Othello



# OBCC Central



# OBCC Garfield H.S.





# OBCC Beacon Hill E.S.



# OBCC Lowell E.S.





Why was a performance  
improvement plan (PIP) needed?





Low Visit  
Volumes

Outcomes &  
Accountability

Priority

Inconsistent  
access

People  
Management

Standard  
Processes

Roles &  
Responsibilities



Low Visit  
Volumes

Priority

Outcomes &  
Accountability

People  
Management

Lack of  
Infrastructure

Standard  
Processes

Roles &  
Responsibilities

Inconsistent  
access









# Principles of Change



Artist: Blanca Santlander

Change

Current  
State



Change

Conflict

Current  
State

# Lewin (1951)

Unfreeze

Change

Refreeze

# Lewin (1951)



Unfreeze

# Lewin (1951)



Change

# Lewin (1951)



Refreeze

# Lewin (1951)

Unfreeze

Change

Refreeze



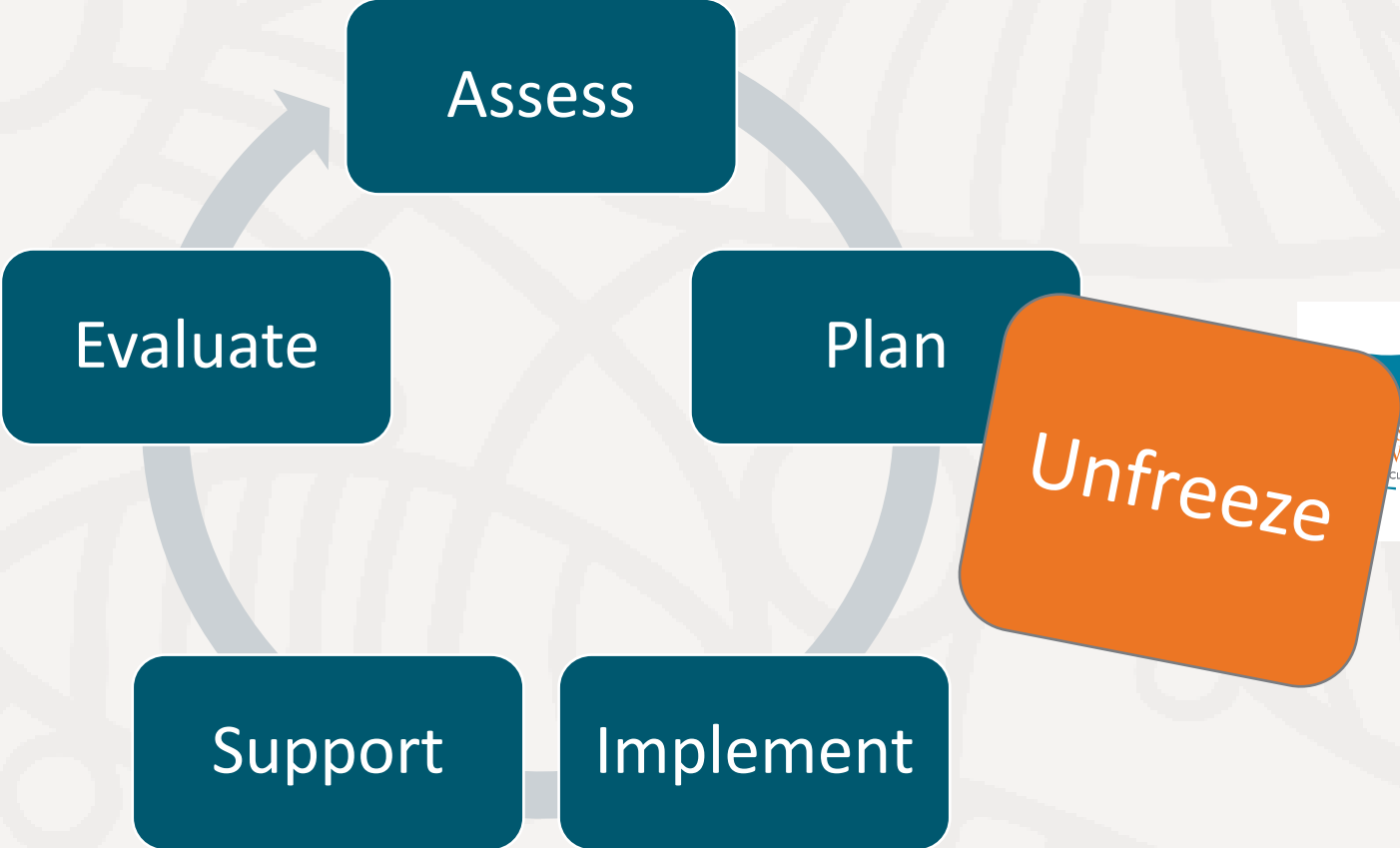
# Lewin (1951)

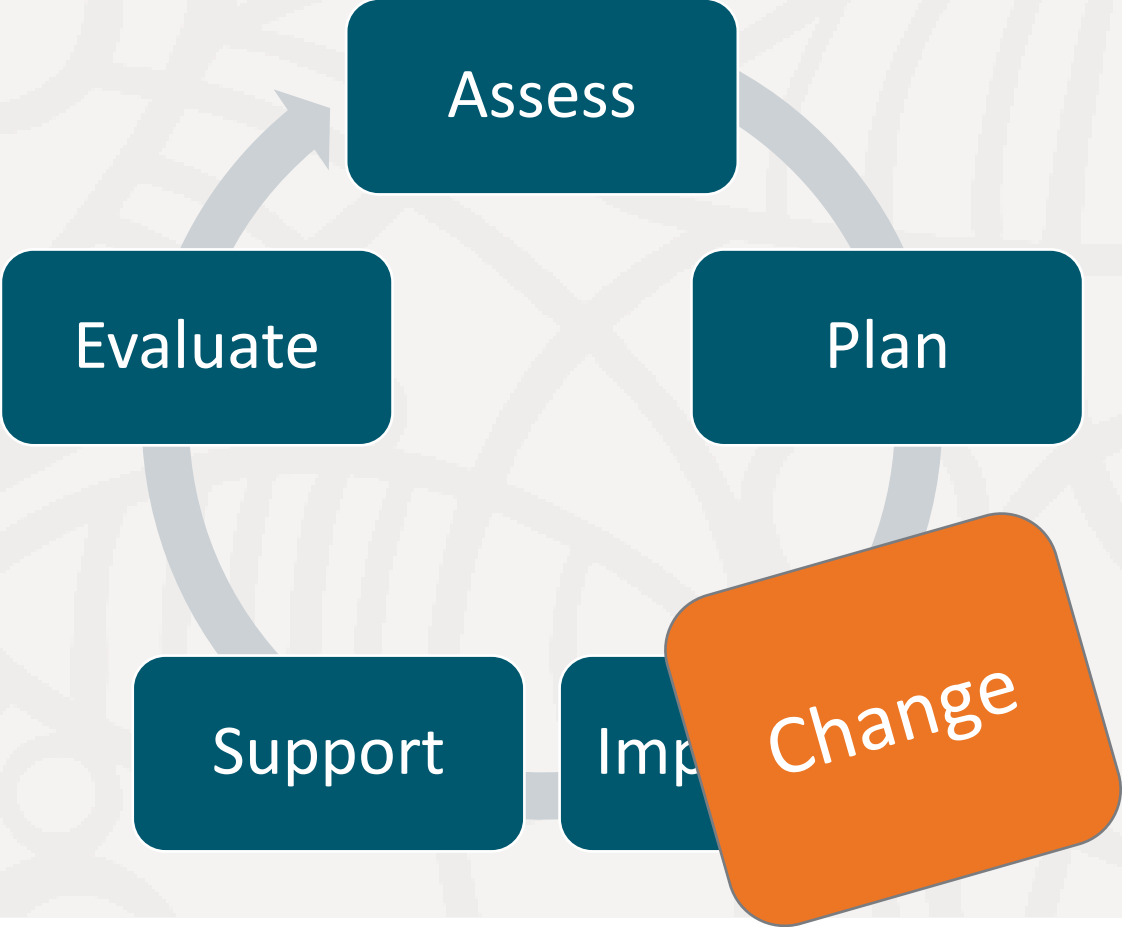
Unfreeze

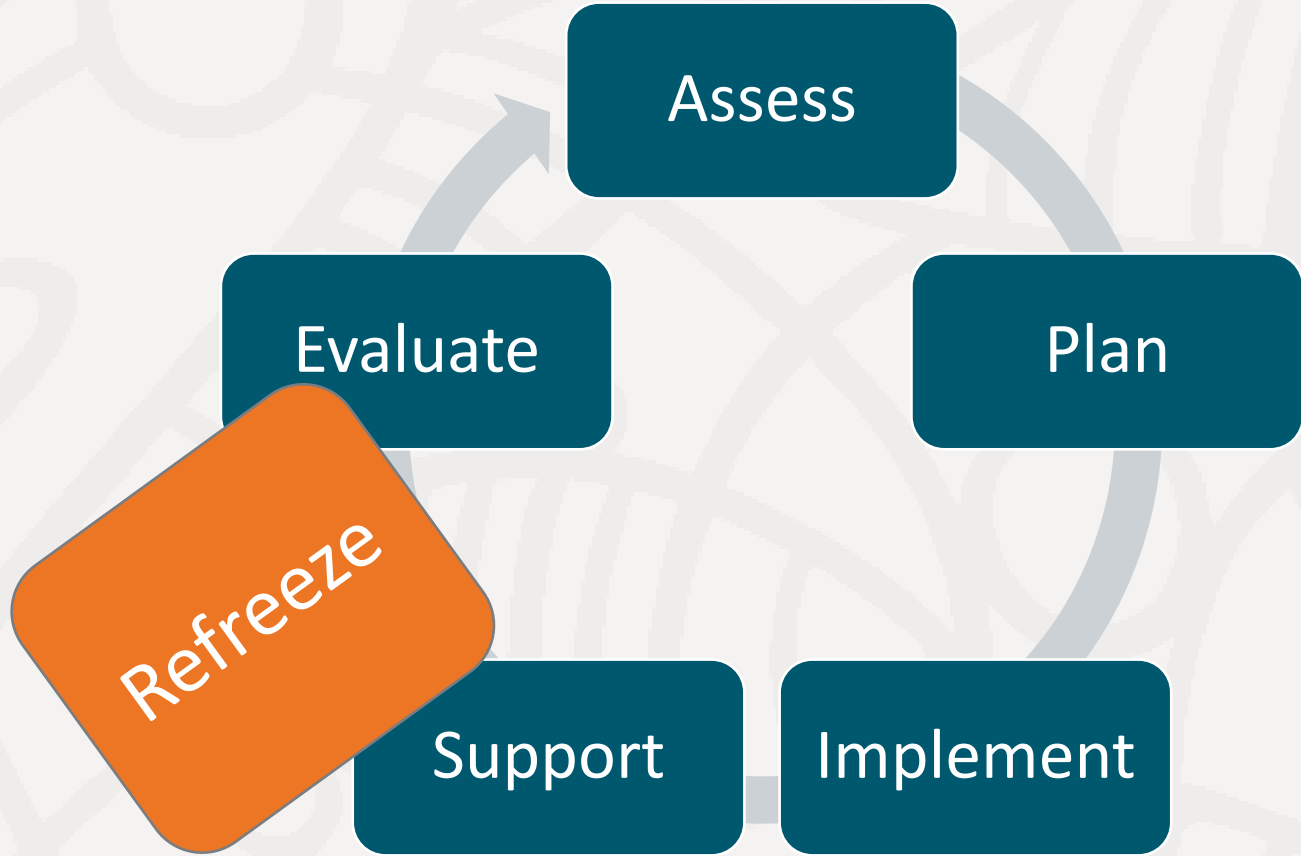
Change

Refreeze









# Data Analysis

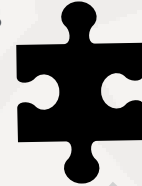
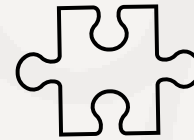


# Accuracy in Data - Challenge

Challenge: E.H.R. > dashboard full of gaps; inaccurate story being told

## Issues:

- **KPIs not tracked properly, broken build, resulting in**
  - ✓ Inaccurate depiction of SBHC volumes, demographics
- **Staff workflow inconsistent, due to**
  - ✓ Improper coding practices
  - ✓ Misunderstandings of what is required for credit



# Accuracy in Data - Solution

KPIs not tracked properly, broken build:

Ensure logic used to track specific metrics/KPIs are accurate and identify solutions with analytics team, E.H.R. support staff, other stakeholders

Staff workflow inconsistent

Identified tracking solutions, rebuilt E.H.R. capture and retrained staff with reference guide. Trained on *the why* as well as *the how*.

*Recipe for success: keep asking "why?" (root cause analysis), identify team, implement changes, train/re-train staff.*



# Visit Volume: Pre and Post Intervention

Feb 1 – May 31	2022	2023	2024
Across three SBHC sites	1,139	1,304	2,087



- ✓ Accurately depicts quantitative data
  - Increases opportunities for expanding resources
  - Shows actual provider optimization

*What are some incentives or potential outcomes your SBHC may experience from improved, accurate data tracking?*

# Process Improvement





Operations Manual



All Staff Workshops



Structured Team Meetings



Relationship Building

# Operations Manual

## OBCC School Based Health – Clinic Administrative Operations Manual



### Table of Contents

1. OBCC SBHC Mission and Vision
2. Contact Information
3. Staff Recurring Schedule
4. OBCC Staff Directory
5. SPS Staff Directory
6. Escalation pathway
7. Unplanned absences, late arrival
8. SBHC Services Offered
9. PHSKC | OBCC Current Agreement
10. SBHC Team Meeting and Huddles
11. Overview of SBHC Enrollment Forms
12. Enrollment Standard Work
13. Scheduling Appointments
  - a. Work Queue
14. Referrals
15. Clinic Visit Protocol
  - a. Pre-visit Chart Review
  - b. Hall Pass
  - c. Checking Patient In
  - d. Notifying Provider Patient Has Arrived
16. Microsoft Outlook (Email/Calendar)
17. Outreach and Partnerships
18. OBCC SBHC Events Request and Planning

Reference guide for every SBHC staff person.

- Administration
- Medical
- Mental and Behavioral Health
- Athletics
- Nutrition
- Social Work
- Dental



Consider a simpler manual for school and external CBO partners. What would you include?

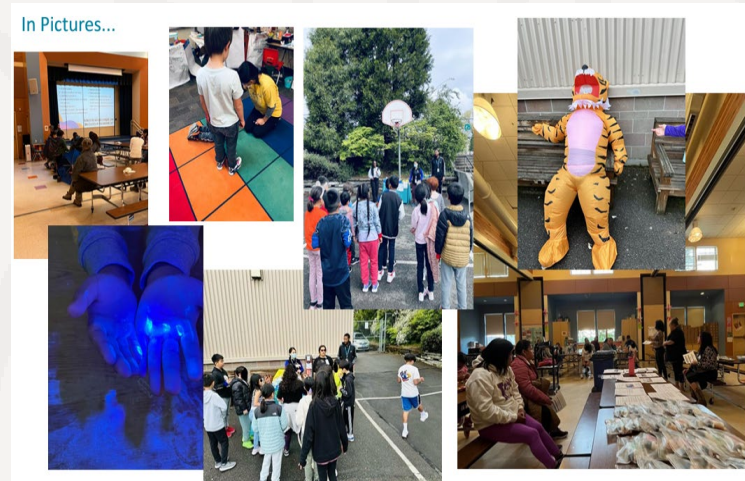
# All Staff Workshops

Multi-team meetings with shared objectives

Relevant content for all SBHC staff

Includes breakout sessions by role and school site

Objectives: motivate, celebrate, learn, discuss, increase communication and team building



# Structured Team Meetings



## Tri-annual SBHC All Staff Workshop

- *Invitees:* all SBHC staff and leadership
- *Cadence:* January, May, September (estimated)

## Monthly/Bi-Monthly Site-Specific Team Meetings

### Garfield

- *Invitees:* GTHC staff, management
- *Cadence:* Every 4 weeks – First Wednesday of the month, 3:30pm – 4:30pm

### Lowell

- *Invitees:* Lowell staff, management
- *Cadence:* Every 8 weeks, Thursday, 1:30pm – 2:30pm

### BHIS


- *Invitees:* BHIS staff, management
- *Cadence:* Every 8 weeks, Wednesday 11am - 12pm

Identify a cadence that works well for your teams. Draft objectives for each meeting type.

Daily huddles,  
monthly meetings, quarterly  
workshops



# Relationship Building

Visibility is key – others may have ideas to help your clinic grow 

Externally with school and community partners 

Calendar of school events 

Join committees, meetings, find intersectionality for enhancing services (PTA, safety committee, etc.) 

Understand school flows and processes to identify opportunities 

Innovate! 

# A successful performance improvement plan

- Dedicated SBHC leadership
- Inter & intra departmental collaboration
- Ability to adapt to changing needs
- Accurate data capture/analytics
- Continuous communication
- *What would you add?*



# Thank you



ODESSA  
BROWN  
CHILDREN'S CLINIC



Seattle Children's  
HOSPITAL • RESEARCH • FOUNDATION



# References

Burnes, B. (2020). The Origins of Lewin's Three-Step Model of Change. *The Journal of Applied Behavioral Science*, 56(1), 32-59. <https://doi.org/10.1177/0021886319892685>

Management Study Guide (n.d.) [Kurt Lewin's Change Management Model: The Planned Approach to Organizational Change \(managementstudyguide.com\)](https://www.managementstudyguide.com/kurt-lewin-change-management-model)