

# CCBHC-E National Training and Technical Assistance Center

*CCBHC New Grantee Learning Community  
Session 3: Practice Transformation as a CCBHC*

January 10, 2023

**CCBHC-E National Training and Technical Assistance Center**

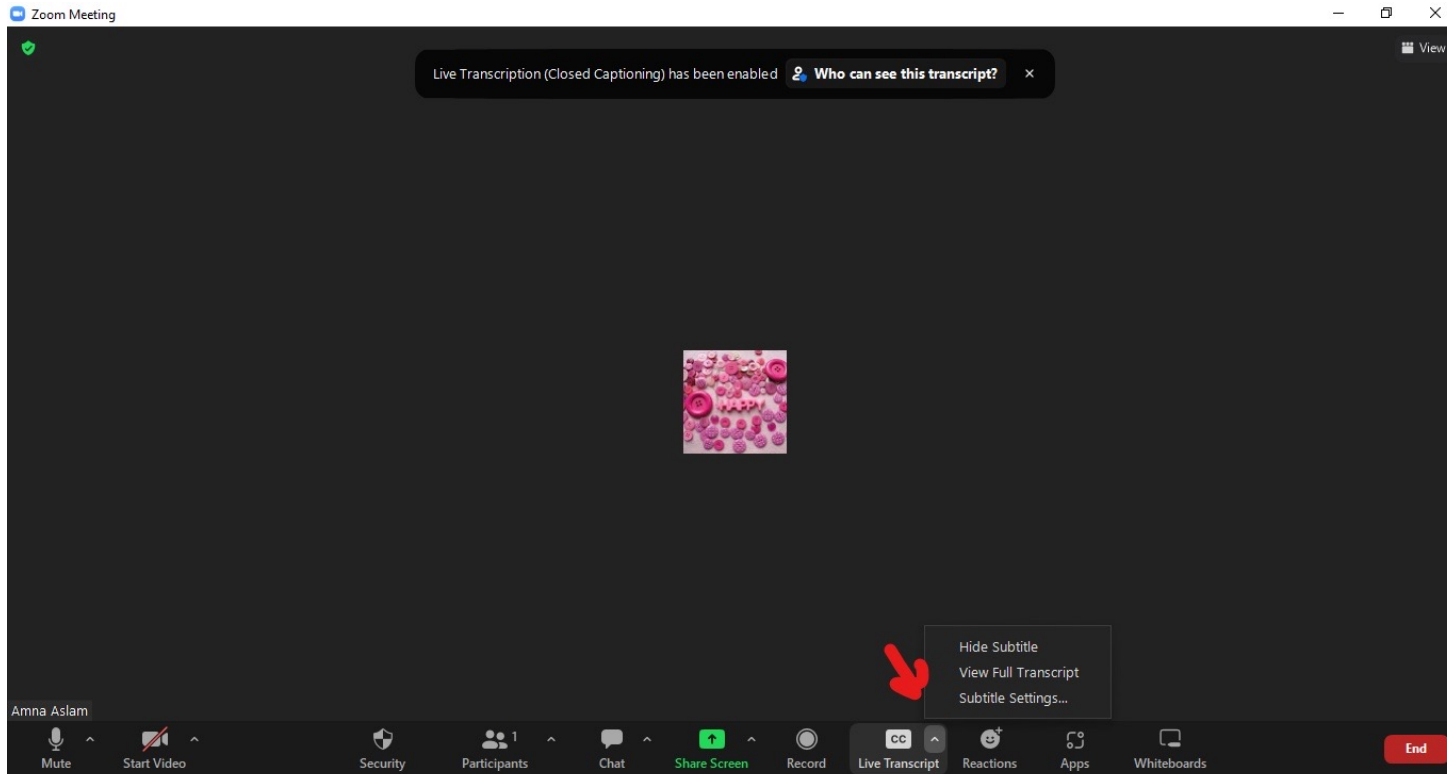
Funded by Substance Abuse and Mental Health Services Administration and operated by the National Council for Mental Wellbeing

# Acknowledgements and Disclaimer

*This session was made possible by Grant Number 1H79SM085856 from the Substance Abuse and Mental Health Services Administration (SAMHSA). Its contents are solely the responsibility of the authors and do not necessarily represent the official views, opinions, or policies of SAMHSA, or the U.S. Department of Health and Human Services (HHS).*



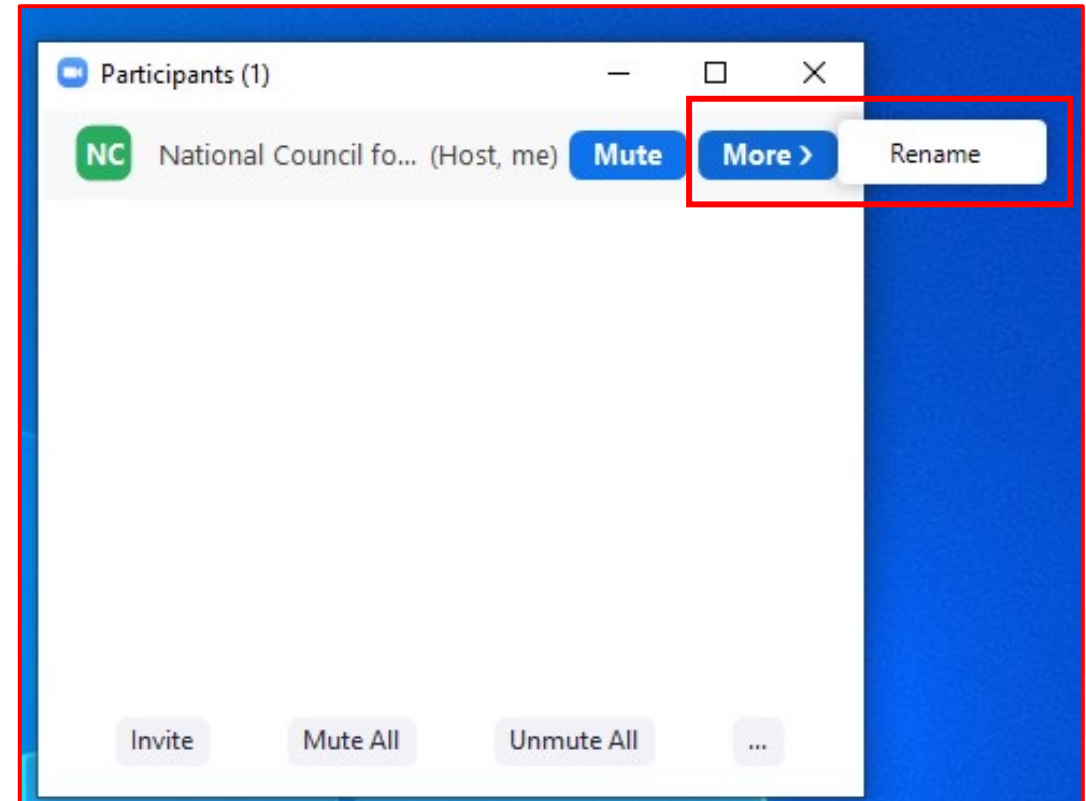
# How to Enable Closed Captions (Live Transcript)



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# Name and Organization

- Please join by video if you are able!
- Please rename yourself so your name includes your organization.
  - *For example:*
    - **Alexandra Meade, National Council**
  - *To rename yourself:*
    - Click on the **Participants** icon at the bottom of the screen
    - Find your name and hover your mouse over it
    - Click **Rename**
- If you are having any issues, please send a Zoom chat message to **D'ara Lemon, National Council**



# Today's Learning Objectives

- Recognize the CCBHC grant as a mechanism for organization transformation
- Identify change management strategies and tactics for CCBHC implementation
- Discuss approaches to integrate and align CCBHC with your organization's culture and strategic plan/mission/vision
- Consider elements of an effective communications plan for internal/external stakeholders

# Your Learning Community Team



**Alexandra Meade**  
Project Manager



**Renee Boak, MPH**  
Consultant and Subject  
Matter Expert



**Jane King, PsyD, LP**  
Consultant and Subject  
Matter Expert



**Sam Holcombe, MPH**  
Senior Director and  
Center Director



**D'ara Lemon**  
Project Coordinator



# Today's Presenters



**Tom Petrizzo**  
Chief Executive Officer  
Tri-County Mental Health  
Services (MO)



**Christie Everett**  
Director of Operations  
Clara Martin Center (VT)

# Community Pulse Check

New Grantee Deliverables

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# Community Check-In



## What is the status of your **needs assessment**?

- Haven't begun needs assessment
- Have begun design but have not started data collection
- In the process of collecting data
- Have completed the needs assessment
- Have questions

How many of the **9 required services** are you currently providing either directly or through a Designated Collaborating

## Organization (DCO)?

- 1-4
- 5-8
- All 9

## Where are you on the **staffing and training plans**? *(select all that apply)*

- Waiting for completion of needs assessment
- Have begun the staffing plan
- Making good progress
- Have completed the staffing plan
- Have questions

## Where are you on the

## **delivery of services plan**? *(select all that apply)*

- Waiting for the completion of the needs assessment
- Have begun the service plan
- Making good progress
- Have completed the service plan
- Have questions

## Where are you on the **sustainability plan**? *(select all that apply)*

- Haven't begun the sustainability plan
- Have begun the

## sustainability plan

- Making good progress
- Have completed the sustainability plan
- Have questions

## Where are you on **attestation**? *(select all that apply)*

- Haven't begun preparing for attestation
- Have begun preparing for attestation
- Making good progress
- Have submitted attestation
- Have questions

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# Practice Transformation as a CCBHC

Samantha Holcombe, MPH

*Senior Director*

CCBHC-E NTTAC

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# CCBHC-E Grant Award: Not “Business as Usual”

Opportunity for:



Organizational transformation: Flexibility to innovate, work differently to meet the needs of staff and those within your community



Improving the experience and wellbeing of those you serve: Enhancing access, quality, and whole-person care



# Leading Change towards CCBHC

Change leadership is both a process and a competency.

The **process** refers to a distinct methodology and set of tools to move people through change.

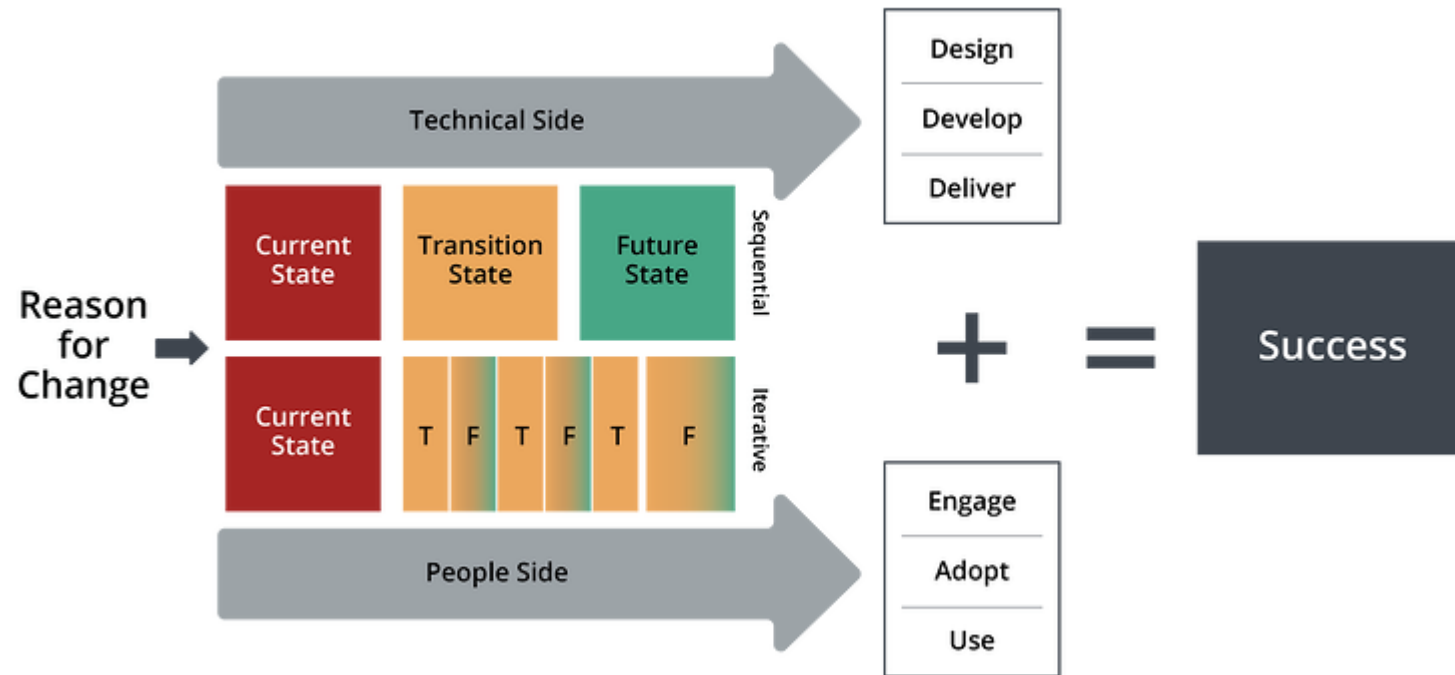
**Competency** is the leader's ability to lead and inspire others through change.

*“Leader” does not solely refer to those in leadership. Although their engagement and buy-in is critical to successful organizational change. You should now consider yourself a change leader – regardless of your title.*

*“The number one obstacle to success for major change projects is resistance and the ineffective management of the people-side of change.”*

Prosci. (2016). Best Practices in Change Management

# Looking Through Both Lenses



- Technical – more process oriented
- People – more competency oriented
- Those driving change management need to integrate both lenses into implementation.

<https://www.prosci.com/blog/a-roadmap-for-building-change-management-competency>

# Change Management for Transformation

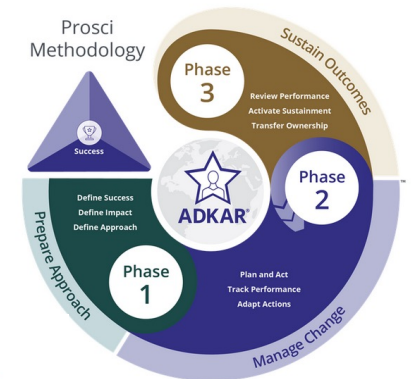
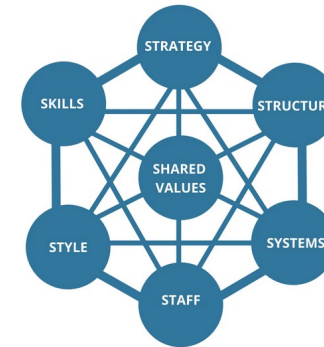
Common themes across models:

- **Shared awareness and understanding:** Sometimes framed as shared values, sense of urgency – giving a strong sense of why
- **Staff engagement and support:** Staff contribute to design, provided with necessary training and skills, designated change agents to champion the cause
- **Technical clarity:** Strategy, systems and process changes are clearly defined and staff understand what is expected of them



**COMMUNICATION:** Clear, frequent, consistent communication at all stages of change – *if you feel like you are saying the same thing over and over, you are just starting to say it enough*

McKinsey 7S Model



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# Lessons Learned From The Field

Tom Petrizzo

*Chief Executive Officer*

Tri-County Mental Health Services (MO)

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# Key Steps

1. Define your vision as a leader, with your leadership team

2. Communicate and socialize the vision to everyone

3. Identify important targets that resonate with values

4. Create an empowered change structure that involves everyone

5. Align the grant funded program elements within the change structure

6. Identify change agents that represent a horizontal and vertical partnership

7. Utilize Continuous Quality Improvement to organize your transformation

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# The Opportunity for Transformation

## The vision of becoming a CCBHC can mean:

*We are becoming an organization where we can put our values into reality.*

*We are becoming an organization that implements the core components of the CCBHC model to provide comprehensive care to the community*

*Every process, program, policy, procedure, and practice; every person providing help, with every penny that we have can become about the needs and hopes of the people and community that we serve, and the values that got us into this business in the first place.*

### Questions to Ask:

- Who are we as an organization?
- What's our purpose or Why do we exist?
- How does the CCBHC grant complement or enhance our "why"?

1. Define your vision as a leader, with your leadership team

# What do you want to **transform** about your service delivery system with this grant?

- **Answer this fundamental question** for your board/community, for all your staff, and for your clinical staff.
- **Determine a strategic reason for grant.** The CCBHC-E grant should align with a significant service gap goal or partnership goal identified in your strategic plan or from survey data or community needs assessment.
- **Identify a Big Audacious Goal (BAG).** It could be wanting to serve more people, but what else? What is your big audacious goal for this grant?
- **Leverage the grant required Community Needs Assessment** to be a driver for staffing, training, cultural/linguistic responsiveness, access,

1. Define your vision as a leader, with your leadership team

## Goal Examples

Big Service Goal  
and/or  
Partnership Goal



# Have a Communication Plan

Consider starting with the following questions:

How would your agency identify targets that can involve everyone?

How would your agency empower your change team with your messaging?

How does the CCBHC grant fit into the agency wide plan?

Communication for Target Audiences:

Board/Community  
All Staff  
Clinical Staff

2. Communicate and socialize the vision to everyone

3. Identify important targets that resonate with values

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# For Board/Community, What Does Becoming a CCBHC-E Grantee Mean?

- We are on the cutting edge of a national trend in community mental health.
- Creates new or builds upon an existing community partnership that we have long wanted to create or bolster (e.g., hospitals, primary care/FQHC, schools, health departments, law enforcement)
- Enhanced ability to respond to community needs (cultural, open access, language access, transportation, etc.)
- Current pandemic and explosion of need for mental health and substance use treatment.

2. Communicate and socialize the vision to everyone



# For Clinical Staff, What Does Becoming a CCBHC-E Grantee Mean?

- Improving our clinical expertise through training and service growth.
- Implementing evidence-based practices, e.g., DBT, MAT, Zero Suicide
- Utilizing peers and peer supports as a SAMHSA best practice
- Meeting some of the social determinants of health, e.g., housing, employment.
- Fills a significant service gap we know exists based on internal data and/or community needs assessment data.
- Improvement of clinical quality outcomes through measures, e.g., engagement, follow-up after hospitalization, suicide risk assessment and intervention.

2. Communicate and socialize the vision to everyone



# For All Staff, What Does Becoming a CCBHC-E Grantee Mean?

- We are growing in concert with our purpose/mission.
- We are living/growing the Big Goal of serving our community in a greater way.
- We are all in this together – the grant means more/better services but also more non-clinical support (e.g., data analyst, billing, front desk, quality management).
- Creating opportunities for staff growth (recruitment, retention and promotion).

2. Communicate and socialize the vision to everyone



# For Clients/Peers, What Does Becoming a CCBHC-E Grantee Mean?

- Better access – ability to receive services more quickly; more flexibility in where and how you receive supports in the community, at home, virtually
- More seamless support – More services being offered in a more integrated manner; Care coordination to assist in connections and transitions with non-health related services or other healthcare providers and navigation support
- Putting you and lived experience at the center – Greater focus on working collaboratively to determine treatment approaches; expanded peer support and connection; involvement of people with lived experience in organizational governance and strategy

2. Communicate and socialize the vision to everyone



# Identifying Targets

Not too many, not too few (3-4)

Targets should be both value-based and specific:

- Welcoming open access
- Effective crisis response for all
- Reach kids in schools
- Team-based care to help us serve those in need
- Improve co-occurring MH/SUD capability
- Improve integration of health care into our services
- Implement an Evidence-Based Practice like Zero Suicide or ACT Team

3. Identify important targets that resonate with values

## Staff Inclusion:

Develop targets with a broad array of staff (clinical and non-clinical). Keep them informed along the way.

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# Empowering Staff & Managing the Grant

We need to meet grant requirements, but our most important message to our organization is this:

- *Our new funding provides some capacity to make progress toward our vision*
- *Everyone in the organization can be a partner in change (clinical and non-clinical, including billing, QI, data reporting, outcomes)*
- *We address “attestation” to help us to make progress toward our vision*

4. Create an empowered change structure that involves everyone

5. Align the grant funded program elements within the change structure

All inclusive change structure:

Include clinical and non-clinical staff in your grant change management team (e.g., Clinicians, Data, Billing, HR, Quality, and Crisis/Access)

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# Implementation & Follow-Through

## As the grant begins...

- It's natural to identify successful strategies to address grant requirements (checklist, NOMs), staffing, budgets, reporting, etc.
- Strategic principles must always be there as a baseline or reminder – why did we do this?

## The long view...

- CCBHC-E grant is a foundational step toward comprehensive, permanent services delivery change and to future, permanent CCBHC status.
- Establish the foundations to address community gaps and needs, expand access to care, delivering services that improve outcomes and the lives of people served.
- Transformed care focused on integrated and coordinated and person-centered care.

Take care of the grant operational items but keep the **transformational vision** alive together with the **long view**

5. Align the grant funded program elements within the change structure



# Lessons Learned From The Field

Christie Everett  
*Director of Operations*  
Clara Martin Center (VT)

**CCBHC-E National Training and Technical Assistance Center**

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# CCBHC as a Philosophy Shift

- Every part of the organization is involved and affected by this change.
- Internal rebranding of organization as a CCBHC agency, and all individuals served are considered CCBHC clients eligible for CCBHC services.
- Requires buy-in from all levels of leadership and shared understanding of the new vision.
- Ongoing communication around the change process and support to staff throughout at all levels.



# Stakeholder Engagement

## Internal Staff Communication

- When to involve broader agency participation in grant development.
- Identify barriers in care delivery staff experience that the CCBHC model can begin to address.
- Identify potential technology solutions that can help streamline/simplify documentation requirements.
- Focus on opportunities for staff training in evidence-based practices they are enthusiastic about.

## External Communication

- Share results of Community Needs Assessment with Partners to identify potential areas of collaboration.
- Expand membership on CCBHC Board Advisory Group.
- Shared CCBHC development with larger community mental health system and your state behavioral health association
- Develop and share easy to understand data/outcomes.



# Addressing Barriers to Grant Implementation

- Collaboration with local Veterans groups and community partners while we continue to attempt MOU with local VAMC.
- Created a NOMs team for tracking and data entry into SPARS; NOMs report built into our EHR.
- Identified targeted locations/times for weekend hours based on community needs assessment.
- Developed Peer Program and Peer Supervisor who assist in recruitment for CCBHC Advisory Workgroup.
- Reallocate unspent grant funds to different funding categories as development needs identified.



# Questions?



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# Breakout Discussion



- What communication strategies have you (or do you plan to) employ across the organization about CCBHC implementation?
- Which change management approaches (Shared awareness and understanding; staff engagement and support; technical clarity, communication) are you strongest in? What strategies do you employ?
- Which change management approaches could you strengthen? What questions do you have for others?

**During the breakout room, assign someone to take notes.** Upon returning to the large group, these questions can then be entered into the chat and become part of the question log.





# Closing: Sharing and Preparing



- **Brave Volunteers:** What did you hear from others in terms of questions and needs?
- **QUESTION LOG:** Take 2-3 minutes to put any questions you generated in the chat to continue to add to our question log
- **Next Session: February 14, 3:00-4:30pm ET**
  - Topic: CCBHC Service Array



# Keep the Conversation Going!

Take the information learned today and bring it back to your agency to continue the conversation.

- Who are you regularly communicating about the CCBHC program with? Who should you include in regular communications and what information is most relevant/useful for them?
- What structures are you or could you employ to facilitate inter-agency collaboration on the model implementation?



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# Additional Support + Upcoming Events

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# Resources

- [National Council Quality Improvement Toolkit](#): Quality improvement is a critical element of practice transformation and many of its concepts align with change management. This toolkit provides guidance and worksheets for setting vision and targets, communication strategies, and planning and implementation.
- [AMA Steps Forward Module - Change Management and Organizational Development](#): This on-demand, self-paced module outlines a simple five-step framework for enhancing organizational development with downloadable tools. Although this is a medically-focused module – the core concepts are easily adaptable and the guides for visioning sessions, assembling teams and project management worksheet are wonderful resources.



# Change Management Resources

- [PROSCI Change Management Resource Center](#): Breaks down the ADKAR method with sample strategies and activities at each stage

# Upcoming Events

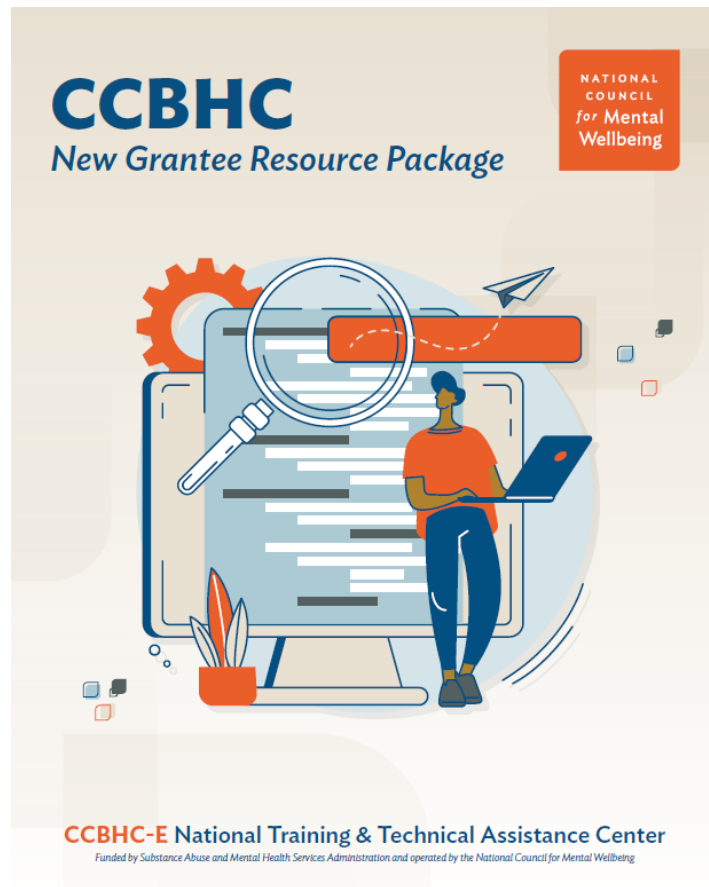
Event Type	Title	Date + Time	Registration Link
Learning and Action Series	<b>Workforce Innovations Series, Session 1: Staffing Model Redesign</b> <ul style="list-style-type: none"><li>During this session, we'll uncover how to optimize staffing models and refine job descriptions. Our goal? To empower staff to practice with their full capabilities! You'll also gain insight on maximizing care management functions and other pertinent non-clinical positions.</li></ul>	Thursday, February 9 <sup>th</sup> , 2023 3:00-4:30pm E.T.	<a href="#">Register here</a>

# Monthly Cohort Calls

**Monthly cohort calls** from the CCBHC-E NTTAC give CCBHC staff members a regular space for sharing with peers, generating solutions and cross-collaboration. Participate as often as you like. Sign up today and share this opportunity with other members of your team!

Event Type	Date + Time	Registration Link
Executives	The last Friday of each month from 12:00-1:00pm E.T.	<a href="#">Register here</a>
Program Directors	The first Wednesday of each month from 12:00-1:00pm E.T.	<a href="#">Register here</a>
Evaluators/CQI Leads	The first Tuesday of each month from 3:30-4:30 pm E.T.	<a href="#">Register here</a>
Medical Directors	The first Monday of each month from 12:00-1:00 pm E.T.	<a href="#">Register here</a>

# New Resource Alert: CCBHC New Grantee Resource Guide



- Developed to provide SAMHSA CCBHC grantees, especially those new to the grant program, with information on CCBHC implementation practices and management of the expansion grant requirements.
- Includes guidelines, references, an adaptable sample workplan, a compilation of frequently asked questions and direct links to relevant CCBHC templates and toolkits.
- [Download here.](#)





# CCBHC-E TTA Center Website



Access our ever-growing resource library, upcoming trainings and events, and request for individualized support.

[CCBHC-E National Training and Technical Assistance Center](#)



# Thank You!





Thank you for attending today's event.


Slides and the session recording link will be available on the CCBHC-E NTTAC website under "Training and Events" > "Past Events" within 2 business days.

Your feedback is important to us!

Please complete the brief event survey that will open in a new browser window at the end of this meeting. Your input helps us improve our support offerings and meet our SAMHSA data metrics.

## Calendar of Events

Search  Start Date  End Date  Select Event 

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