



PERXU

Program Evaluation and Research Unit

Systems Transformation Framework for COEs



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This menu allows you to **control**:

- **Raise Hand**
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- **Your feedback matters!** Please complete the evaluation and post-test at the end of the webinar to receive continuing education credit and to help us improve future trainings.



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Mutual Agreement

- Everyone on every PERU webinar is **valued**. Everyone has an expectation of **mutual, positive regard** for everyone else that respects the **diversity** of everyone on the webinar.
- We operate from a **strength-based, empathetic, and supportive** framework – with the people we serve, and with each other on PERU webinars.
- We encourage the use of **affirming language** that is not discriminatory or stigmatizing.
- We treat others as **they** would like to be treated and, therefore, avoid argumentative, disruptive, and/or aggressive language.



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Mutual Agreement (cont.)

- We strive to: **listen** to each person, avoid interrupting others, and seek to **understand** each other through the Learning Network as we work toward the highest quality services for COE clients.
- Information presented in Learning Network sessions has been vetted. We recognize that people have different opinions, and those **diverse perspectives** are welcomed and valued. Questions and comments should be framed as **constructive feedback**.
- The Learning Network format is **not conducive to debate**. If something happens that concerns you, please send a chat during the session to the panelists and we will attempt to make room to address it either during the session or by scheduling time outside of the session to process and understand it. Alternatively, you can reach out offline to your PERU point of contact.



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Introduction to Systems Transformation Framework (STF)



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Learning Objectives

By the end of this module, you will be able to do the following:

- Recognize the relationship between **organizational health** and **client experience**.
- Identify your organization's domains of **strength** and opportunities for **improvement**.
- Explain how **data** collection drives **transformation**.



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Systems Transformation Framework

“A model to view the health care system in a way that maintains a strong system identity, better anticipates the downstream consequences of our actions, and creates the emergent characteristics needed for adaptation and transformation.”



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System Transformation Framework Creator



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Complex Adaptive Systems (CAS)

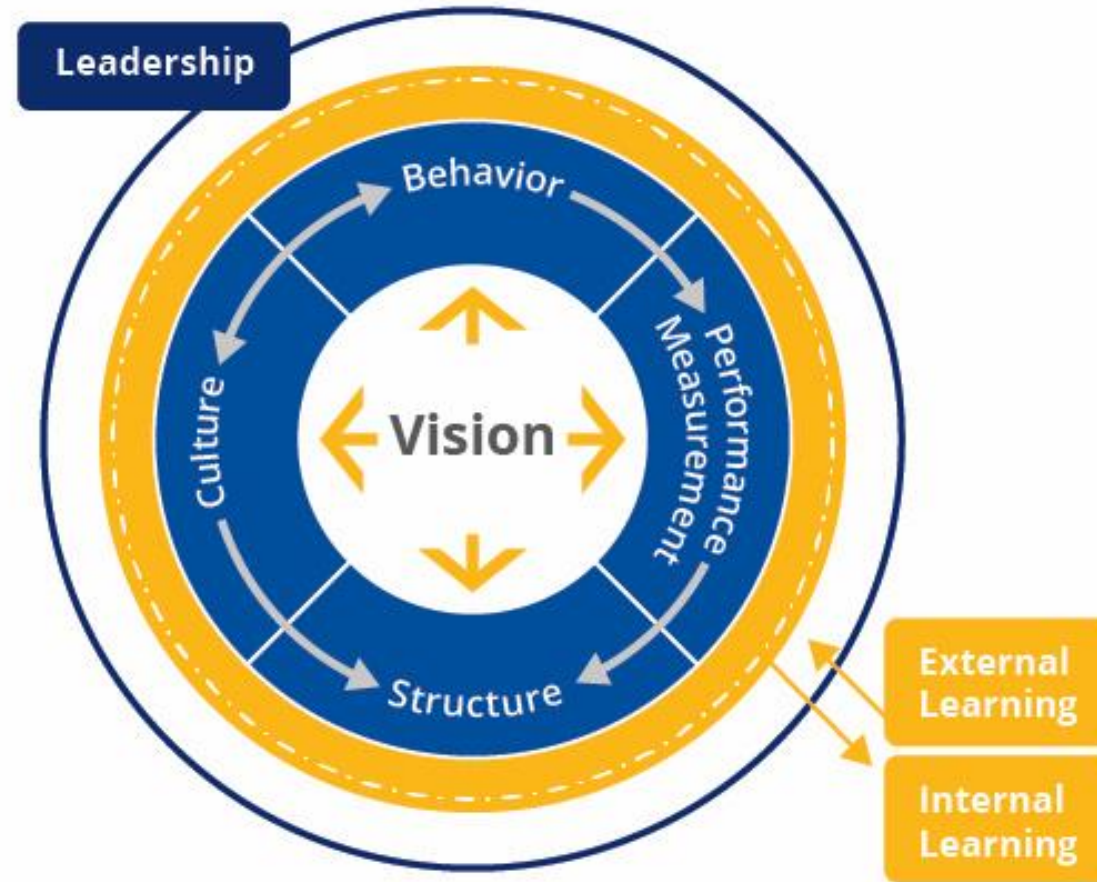


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STF Domains



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What is Organizational Health?

“Organizational health is the ability of an organization to align around a clear vision, strategy, and culture to innovate effectively and sustainably.”

Centers of Excellence CAS



What goes into your
COE's functioning?



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COVID-19



What happened when
COVID-19 entered the
area?



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FORE Findings

Higher organizational health was associated with:



Shorter amount of **time** for COEs to reach **stability**



Lower staff and leadership **turnover**



Higher **satisfaction** with the organization's **response** to COVID-19



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The Importance of Organizational Health Important for COEs

- Poor organizational health is a **barrier** to achieving **vision** (implementation, innovation, and transformational improvement)
- Organizational health has a direct **effect on client experience**, with improvements in organizational health resulting in **improved client engagement, retention, and recovery metrics**
- Both the client and staff member deserve the vision to be fulfilled
- Shift in the **payment structure** in 2023 could require that some **innovations** be implemented



Poll Question

How likely is it that everyone at your COE can recite its vision?

- Very likely
- Somewhat likely
- Somewhat unlikely
- Very unlikely



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STF Domains: Vision

- Ideal state
- Known by all
- Drives the “**why**” for innovation



The Golden Circle



COE Vision

The Pennsylvania Department of Human Services (DHS) defines the **vision** of the COE as: “ensuring **effective care coordination, integrating physical and behavioral health** needs for every patient with an Opioid Use Disorder (OUD), and **increasing access to Medication-Assisted Treatment (MAT).**”



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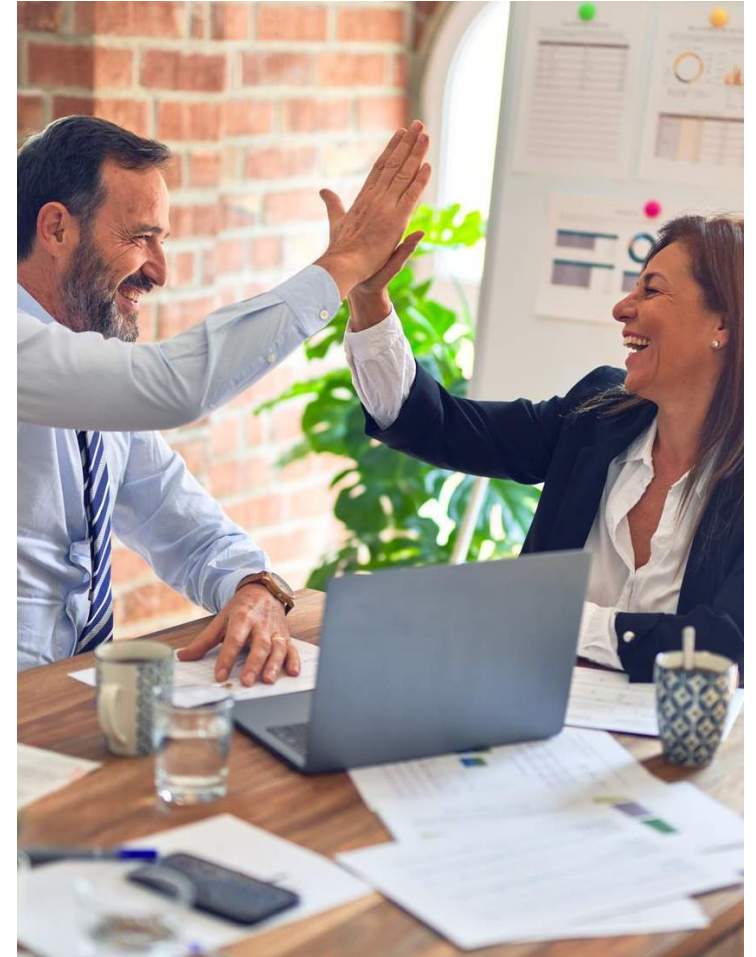
STF Domains: Leadership

- Promotes staff development and organization **adaptation**
- Provides **resources** for success
- **Delegates** for staff growth



STF Domains: Culture

- Values, beliefs and assumptions
- Guide for **decisions and actions**
- Conflict **communication**



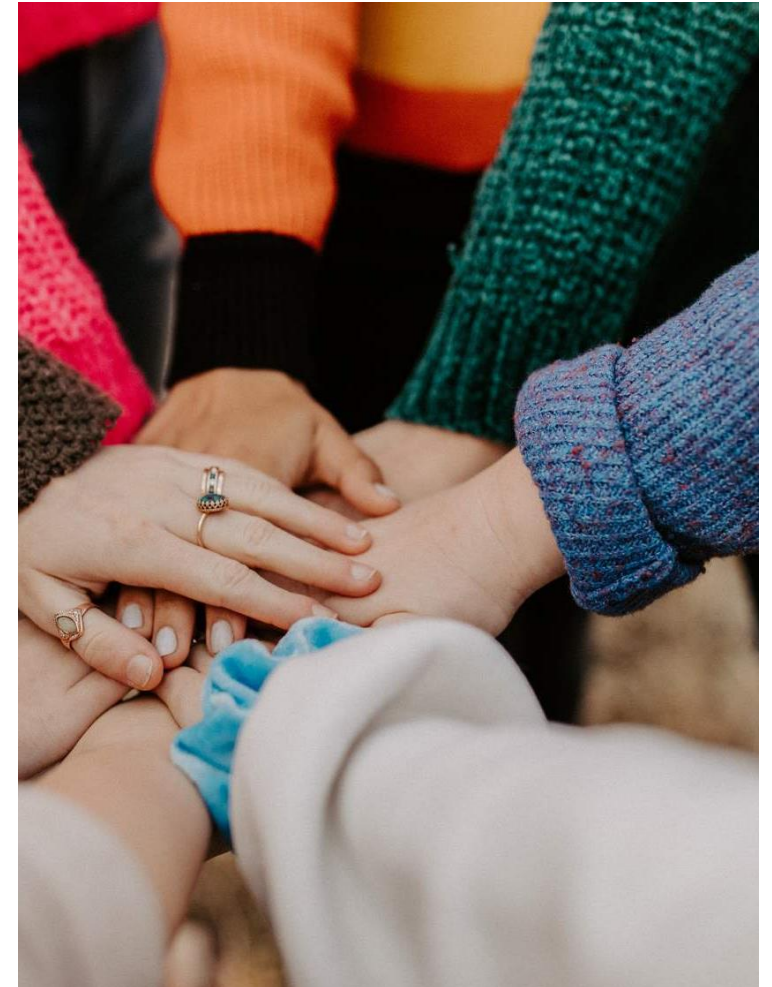
STF Domains: Structure

- **Flow** of information
- **Role clarity**
- **Confidence** in the system



STF Domains: Behavior

- Relationships
- Decision-making
- Power
- Conflict
- Learning



STF Domains: Performance Measurement

- Data usage
- Reflective of vision
- Transparent



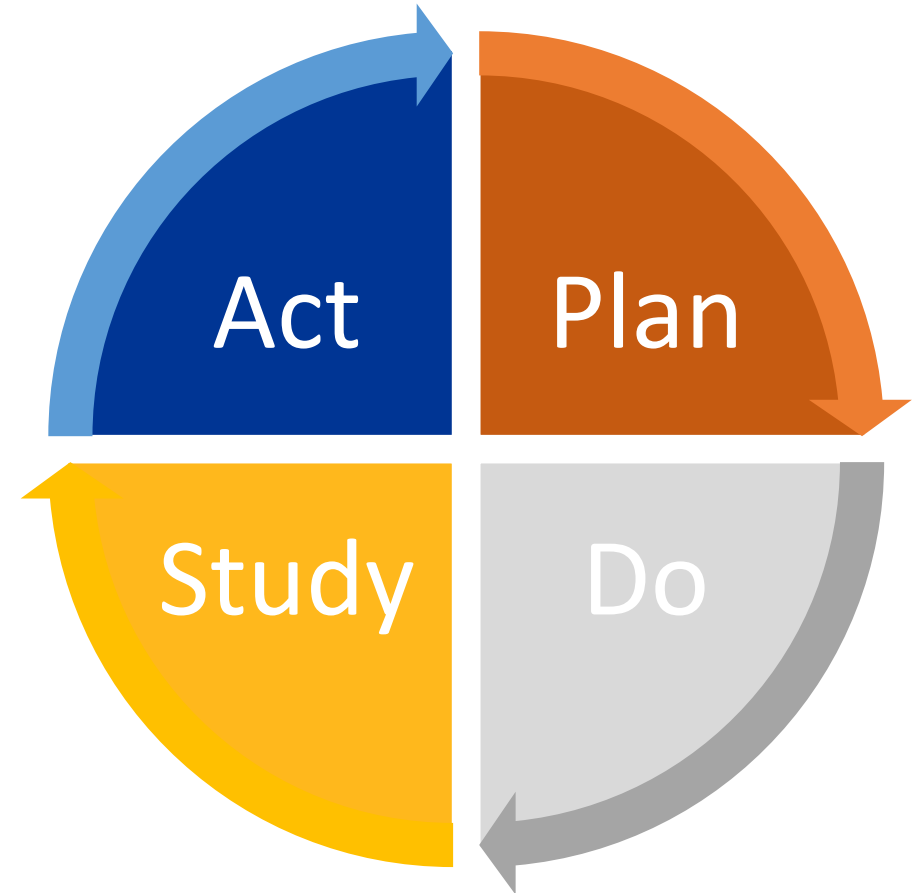
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STF Domains: Internal Learning

- **Formal** learning systems
- Reflective of the whole and parts
- **Growth** through internal organization, reflection, and problem solving



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STF Domains: External Learning

- **Responsive** to needs of staff, clients, and community
- Bringing knowledge **into** the organization



STF and COEs

STF Uses

- **Assess** readiness to change
- Guide **implementation** of innovations
- Determine likelihood of **sustained implementation**
- Use organization and staff **strengths** to execute new strategy

COE Applicability Examples



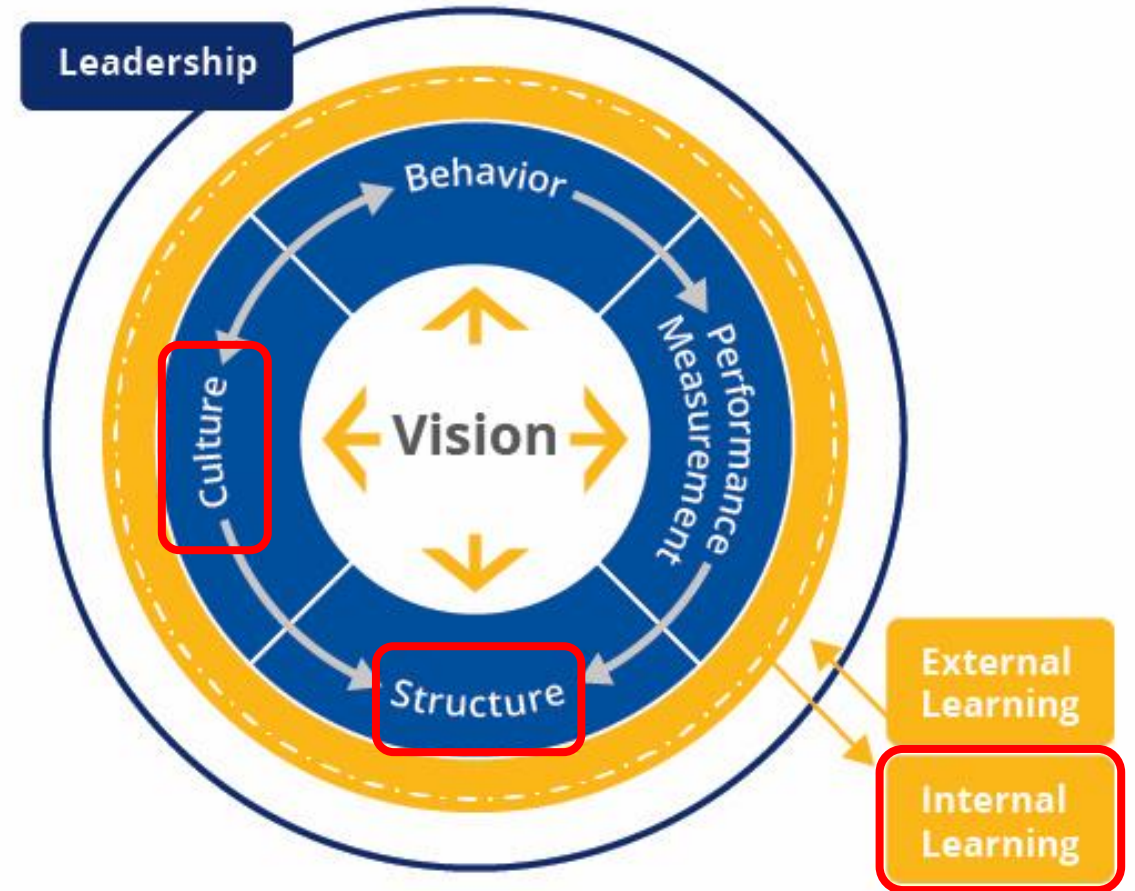
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COE Common Challenges

Staff/leadership turnover



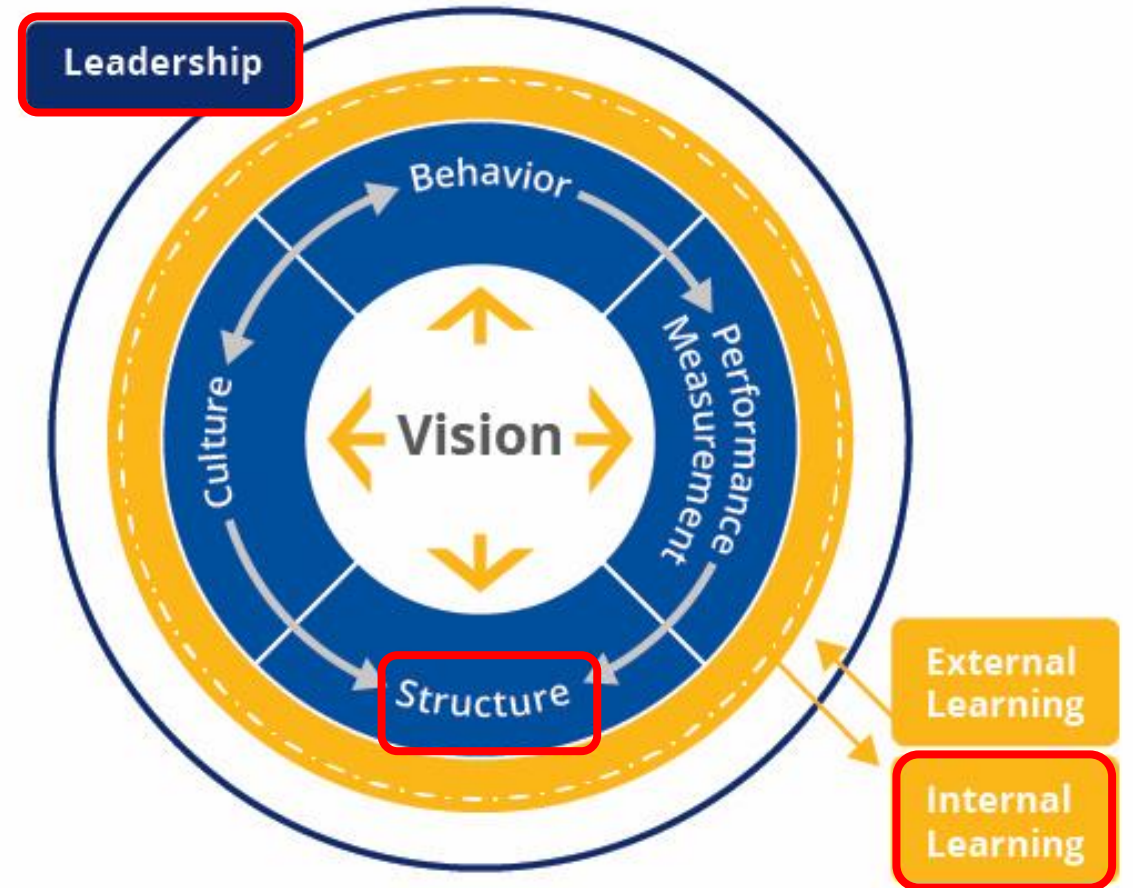
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COE Common Challenges

Program growth



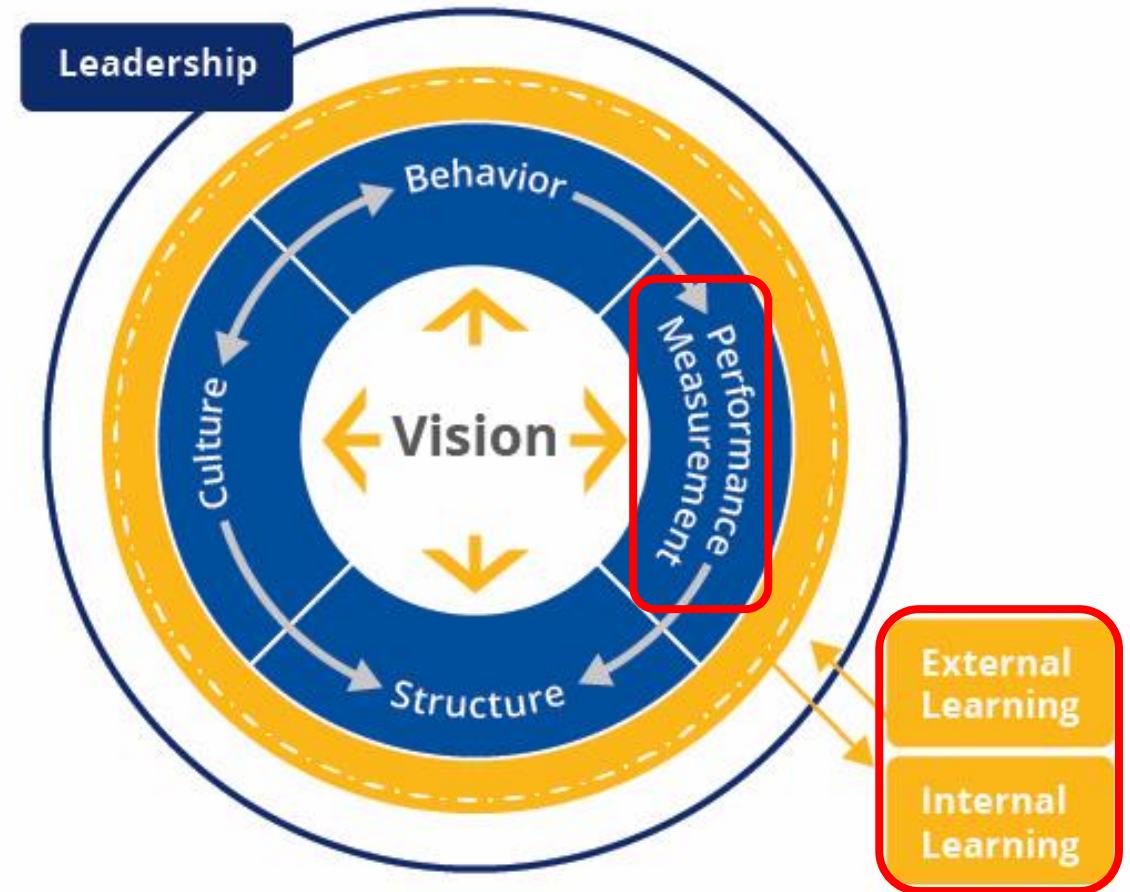
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COE Common Challenges

Client retention



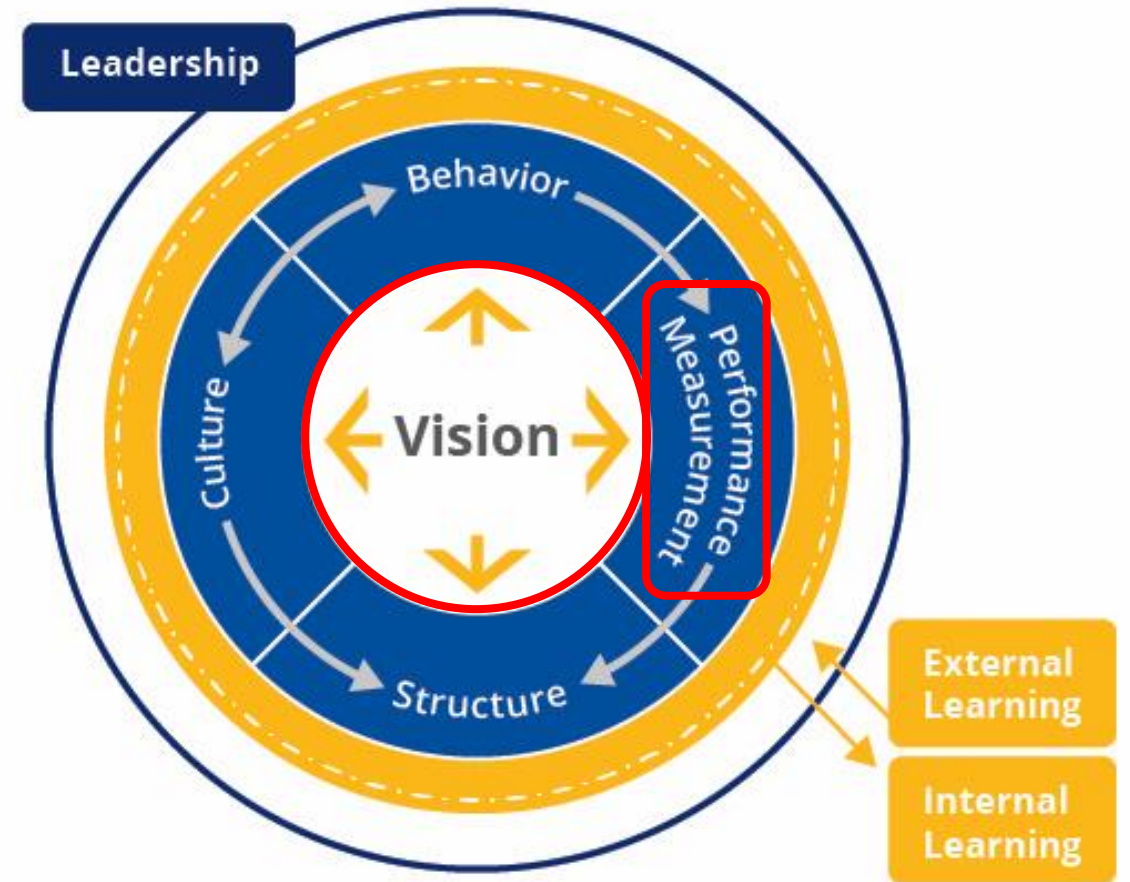
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COE Common Challenges

Profitability of services



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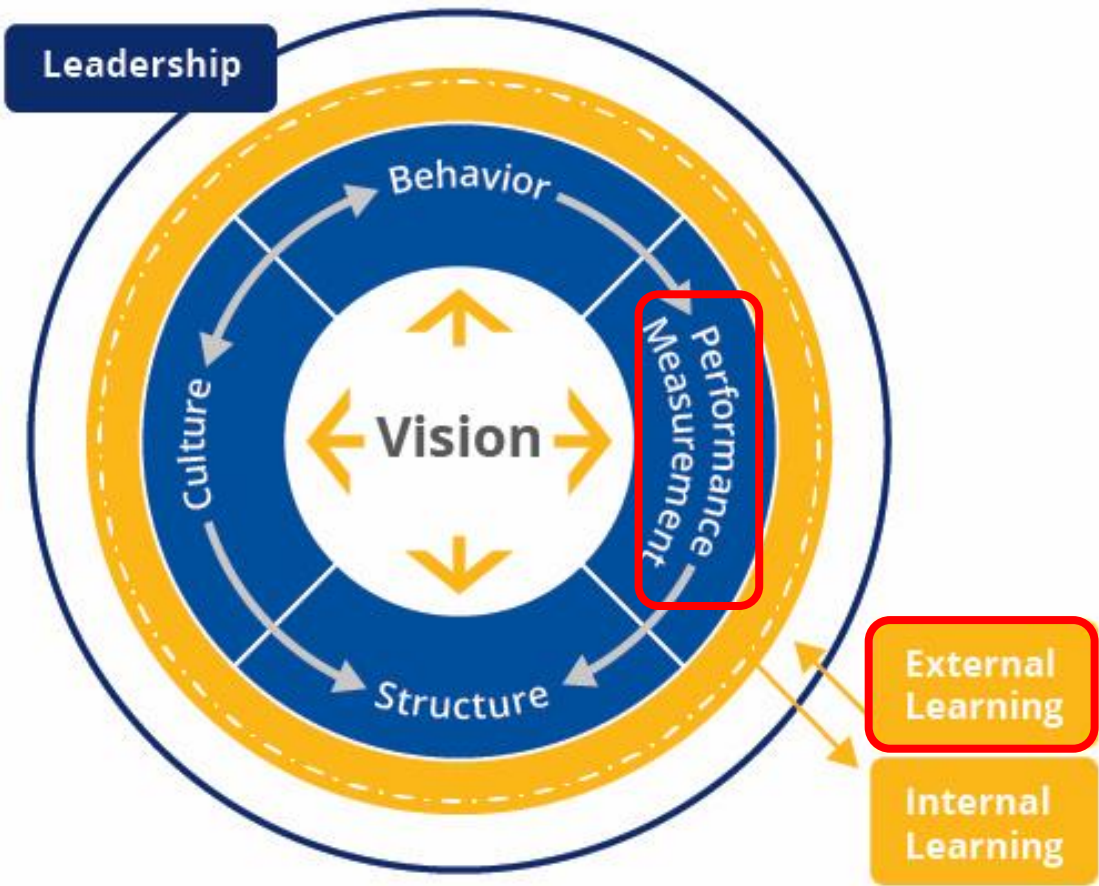
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Looking at COE Data Through an STF Lens

Engagement & Retention

Quarterly Summary of Performance Metrics

Metric (Quarterly Avg.)	COE Org.	BH COEs	All PA COEs
New Clients Enrolled (per Month)	290	1,268	1,991
Client Engagement Rate	76%	62%	58%
Percent of Clients Returned	80%	64%	65%
Initial BARC-10 Assessment Rate	81%	63%	58%



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High Risk Clients

Table 1. Client Demographics: High Risk Indicators (Total 73 Client Profiles in REDCap)

Indicator	Total Clients (all)	High Risk (all)	Total Clients (qtr)	High Risk (qtr)
Criminal Justice Involvement	73	46 (63%)	36	23 (64%)
Current Pregnancy	38	4 (11%)	17	Supp. (18%)
IV Drug Use	71	50 (70%)	35	24 (69%)
Military Status	64	Supp.	34	Supp.
Overdose History	73	31 (42%)	36	14 (39%)

* Total Clients (all) indicates all clients within the COE organization with information provided for the indicator; Total Clients (qtr) indicates a subset of clients enrolled during the reporting quarter.

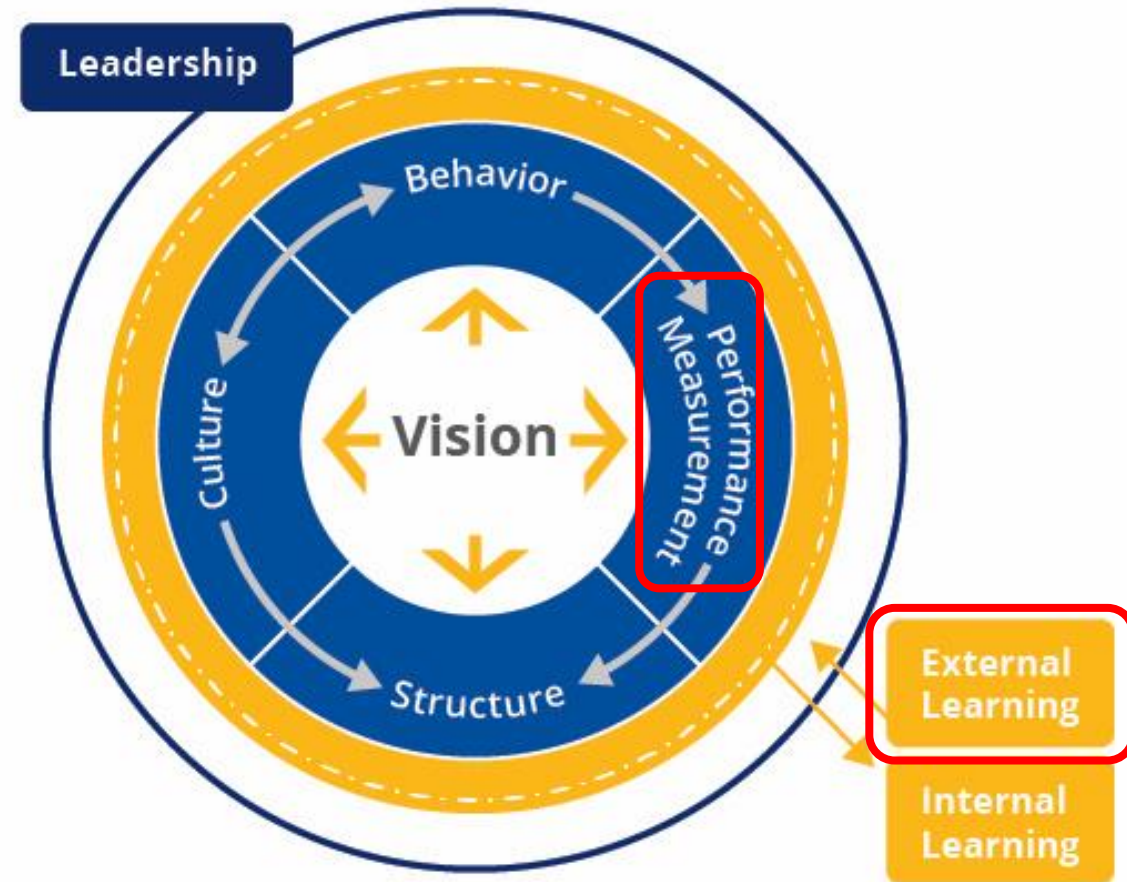
† High Risk (all/qtr) indicates the number (percentage) of clients who self reported "yes" in the high risk categories.

‡ Note: The client is being excluded if a client chose not to answer or the COE did not enter the client's response.

§ "Current Pregnancy" excludes clients whose "Sex Assigned at Birth" is "Male."

¶ Data is being suppressed when one to three clients self reported "yes" in the high risk categories.

** See breakdown by location in Appendix.



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Interaction Activities

Table 2a. Interaction Activities: Selected Medical Needs

Activity	Total Clients (all)	W/ Needs (all)	Total Clients (qtr)	W/ Needs (qtr)
Behavioral/Mental Health	73	32 (44%)	70	28 (40%)
Dental Care	73	0 (0%)	70	0 (0%)
Prenatal Care	73	2 (3%)	70	2 (3%)
Primary Care	73	28 (38%)	70	25 (36%)

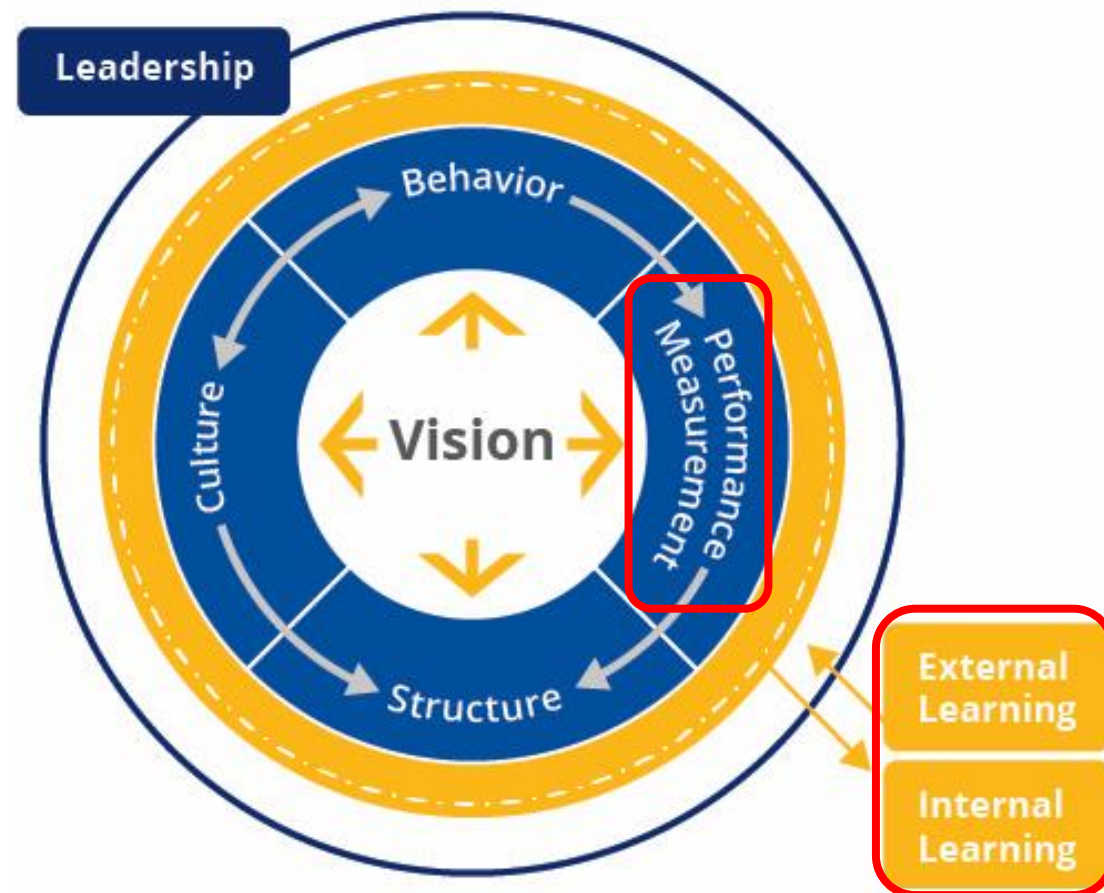
* Total Clients (all) indicates all clients within the COE organization had at least one client visit over time;
Total Clients (qtr) indicates a subset of clients had at least one client visit during the reporting quarter.

† W/ Needs indicates the number (percentage) of clients received medical/non-medical services related to each activity, including "Need Indicated", "Referral for Service", or "Service Performed/Need Met."

Table 2b. Interaction Activities: Selected Non-Medical Needs

Activity	Total Clients (all)	W/ Needs (all)	Total Clients (qtr)	W/ Needs (qtr)
Childcare Services	73	1 (1%)	70	1 (1%)
Drug & Alcohol Counseling	73	44 (60%)	70	38 (54%)
Food Services	73	24 (33%)	70	21 (30%)
Harm Reduction	73	37 (51%)	70	32 (46%)
Housing	73	45 (62%)	70	37 (53%)
Transportation	73	31 (42%)	70	29 (41%)

* Please refer to Table 2a footnote.



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All Domains Assessment

Vision

- Is there a **vision**?
- Does everyone **know** the vision?
- Is the vision “present” in the **decision-making process**?

Leadership

- Do formal leadership staff **model actions** towards the vision?
- Are opportunities provided for staff **growth** and **development**?

Culture

- Is the organization **united** with shared values, beliefs, and assumptions?
- Is conflict appropriately **communicated** or ignored?

Structure

- Is there **clarity or confusion** for how the organization is structured?
- Is their **confidence** in others doing their assigned responsibilities or confusion as to who is responsible for what?

Behavior

- Does everyone **understand** how decisions are made?
- Is power used over others or **for others**?

Performance Measures

- Do staff **know** what the performance measures are for their work?
- Do staff **understand** how performance measures are chosen, assessed, and used?

Internal Learning

- Does internal learning **occur**?
- Is there clarity on how **performance measures** are used for internal learning?

External Learning

- Is external learning **supported**?
- Do staff feel **comfortable** and **supported** to admit when they don't understand something and need additional training?



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Questions?



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