

Driving Progress and Strengthening QI Culture: A Leadership Role in PHMI Quarterly Reviews

May 2026 Leadership Roundtable

On May 6, 2026, PHMI hosted health center leadership and clinical leads for a PHMI Leadership Roundtable on *Driving Progress and Strengthening QI Culture: A Leadership Role in PHMI Quarterly Reviews*. The virtual meeting focused on understanding the strategic value of the **PHM Leadership Quarterly Review** for course correction and organizational alignment, and peer sharing of leadership strategies to drive improvement and advance organizational PHM goals.

PHMI Leadership Quarterly Review

The **Leadership Quarterly Review** provides dedicated time for health center leadership and implementation team members to have a data-driven discussion on SMARTIE goal progress to advance their PHM goals. The review has also been designed to connect the work of PHM to organizational strategy and objectives.

During the May 2026 PHMI Leadership Roundtable, after a short simulation of a quarterly review, health center leaders and clinical leads shared insights and best practices for approaching the Leadership Quarterly Reviews. A summary of small group discussions is outlined below.

Small Group Breakout Takeaways

Group 1: Health Center Leadership (Non-Clinical)

- Health center leaders acknowledge the potential impact of budget constraints on PHM Implementation Team activities. Involvement of the CFO in the Leadership Quarterly Review allows for a better understanding of what the CFO needs to see in the review and what priorities and questions arise from the financial lens.
- Reviewing data in shorter time intervals (e.g., weekly data runs) can provide quick insights. This can balance the use of longer-range data reviews, which also can be beneficial in understanding progress.
- Including PHM Implementation Team members, such as those with “boots on the ground,” in the review meetings allows for additional support for the PHMI Lead, and a more holistic view of the efforts. These staff help explain findings and advocate for resources or support to advance the change strategies. Additional staff to include in the review meeting should include the clinical lead and possibly medical assistants, clinic supervisors, and case managers.

PHM INITIATIVE

- Leadership plays a key role in the review since they are responsible for the strategic plan, including quality goals, data systems for tracking, and operational alignment to PHM efforts.
- Success is achieved by embedding PHM into daily workflows and visits, not by treating it as a separate project. Leadership can communicate and demonstrate that the initiative has a solid base, full leadership support, and a commitment to its continuation.
- Leadership provides encouragement for staff and team members to embrace changes. PHMI is seen as an opportunity to significantly enhance the program and bridge the gap between executive leadership and the care team through innovation support.

Group 2: Clinical Leaders

- Clinical leaders also noted the importance of including the CFO in the review meetings to be part of the discussions and communicate what data is important for financial/revenue considerations. An additional benefit is ensuring any adaptation in the EHR captures needed codes and information for the finance team too.
- Holding the Leadership Quarterly Review meetings separately from the health center's existing quality improvement (QI) meeting may be beneficial since the review meeting has a broader and more strategic focus than QI meetings. It is important for health centers to review their existing meetings and determine how the Leadership Quarterly Review fits in.
- Confirming accuracy of data is critical prior to sharing data with providers and care teams.

Best Practices for Engaging Providers in Change Strategies

- Provider engagement is most effective when focused on patient outcomes and process improvements rather than financial incentives.
- Stratifying data by "rendering" provider or individual panels helps address issues of continuity and ensures data accurately reflects clinical practice.
- Utilizing flexible data tools that allow for 'slicing and dicing' facilitates the sharing of relevant dashboard information with clinicians.
- Appointing individual providers to lead initiatives increases organizational buy-in and clinical leadership.
- Identifying which empanelment-level data points are actionable remains a critical challenge in effective data sharing.

Visit the [Leadership Roundtable on the PHMI Cohort Portal](#) to find resources for health center leaders navigating PHM transformation, including a sample Leadership Quarterly Review agenda.