

Moving from Implementation to Spread

March 4, 2026

Presenter



Jen Powell

Sustainability
& Spread SME

Session Learning Objectives



1

Describe relationship between implementation, sustainability and spread.

2

Define spread for different sized CHCs and context.

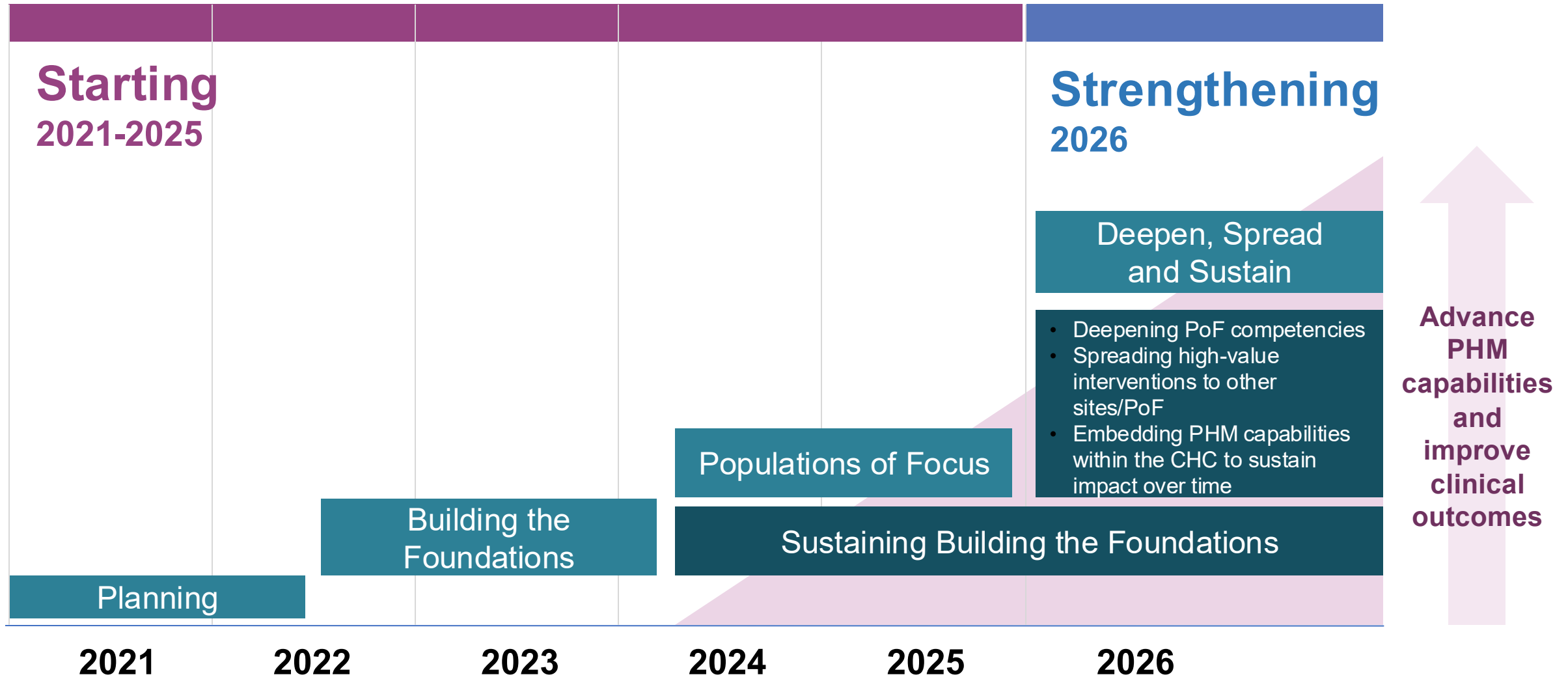
3

Describe conditions for spread.

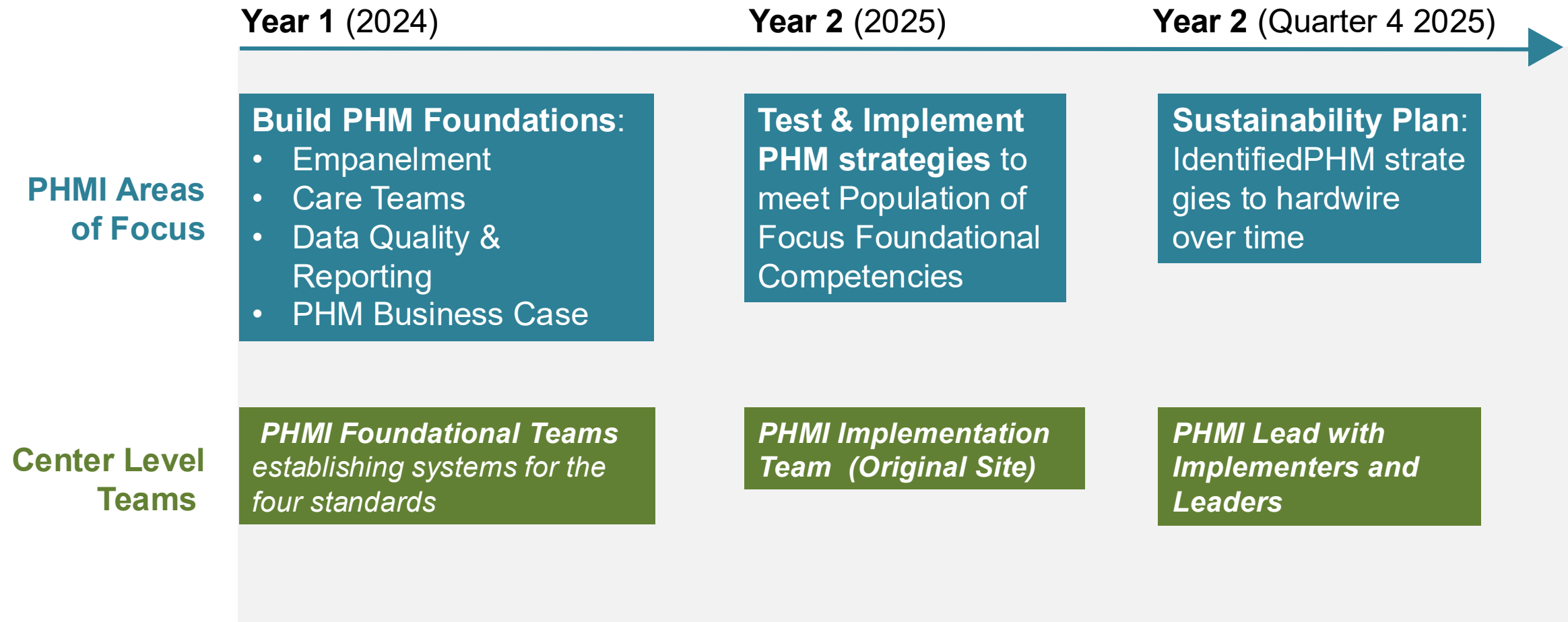
4

Articulate next steps in developing SMARTIE goal.

Continuing Our PHMI Journey



Moving from Implementation to Sustainability to Spread



Moving from Implementation to Sustainability and Spread



What Is Spread?

The process through which **new working methods** developed in one setting are **adapted in another context.**

PHMI Definition of Spread for Centers with two or more sites

- Spread is defined as taking an existing, tested, and documented PHM strategy from the original site (clinical site where the strategy was tested) to one or more additional sites.
- Spread strategies should be selected that will enable your center to meet your clinical outcome goals either in 2026 or beyond, including that it will be spread across enough patients/members to meet the clinical goal.
- Location is defined as a new geographic location where there is one or more primary care provider/care team. Center will define the scale of the spread (will the strategy be spread across one location or more than one location, with specificity to the number of care teams?).

PHMI Definition of Spread

One site

Centers with one site or two sites

(where 2nd location is not conducive to spread):

1. Adapt an existing, tested, and documented PHM strategy applied to one PoF HEDIS/UDS measure to another HEDIS/UDS measure *in that PoF*.
2. If all PoF measures are at or close to goal and trending upward, CHC will select a strategy to spread that can target a HEDIS/UDS measure *in another PoF*.
3. Spread PHM strategy across another service line.

Example 1:
PHM strategy that was applied to HTN high risk patients is spread to high-risk patients with diabetes.

Example 2:
PHM strategy for outreach to high-risk patients with chronic conditions is spread to patient outreach for an adult prevention measure.

Example 3:
PHM strategy for outreach is adapted for patients enrolled in ECM.

Spread Worksheet

PHM INITIATIVE
PHMI 2026 Spread Team Worksheet

Conditions for Spread

- ☐ **Strategy has been tested and aligned with 2026 clinical goal:** Strategy is evidence-based and derived from a credible source (which could include PHMI sources such as the PoE change package); and/or the original site was able to demonstrate effectiveness. There is confidence that this strategy will support reaching the 2026 clinical goal.
- ☐ **Strategy is adaptable in a new context:** Strategy is relatively easy to adapt in other settings and has relative advantage compared to the 'old way'. The strategy is testable (ability to test on a small scale). There is a designated team (ideally one or more who has implemented the strategy) to support spread. Technology is portable and can be easily adapted in new context/location.
- ☐ **Strategy has clinical/operational structure in place:** Strategy is documented (protocols, workflows, policies); strategy has been set up in a way that it is 'easy to do the right thing' (EMR smart phrases, defaults; strategy can be tracked for progress with a designated technology platform.
- ☐ **Strategy has organizational structures in place:** There are organizational structures to support spread, including leadership commitment at each level of implementation, a governance structure; there is a plan for training and capacity building for the new locations/ sites. Care team training is updated to include the strategy if applicable.
- ☐ **Strategy shows promise of financial sustainability:** Strategy is aligned with financial reimbursement and/or creates efficiency and/or potential cost savings. The team has established a financial indicator for this spread strategy.

Our 2026 Clinical SMARTIE Goal:

Step 1: Define what spread means for your health center

Conditions to Consider: Selecting a Strategy & Selecting Where to Spread



Strategy has been tested and is aligned with the 2026 clinical goal



Strategy is adaptable to new context



Strategy has clinical/operational structures in place



Strategy has organizational structures in place



Strategy shows promise of financial sustainability



Optimal Health Center has 6 primary care locations; 4 locations have multiple primary care teams. They established systems for **empanelment** in 2024; they have successfully 'paneled' patients for 3 of the 6 primary care locations. They are using their PHM platform to enhance communication and tracking with provider/care team.



Their designated Population of Focus is **Chronic Conditions**. Their clinical goal is to improve the **number of patients with controlled A1C (to under 9) from 50% to 70% by the end of the year**.
They have identified outreach for care gaps as a key strategy to meet their clinical goal.



They have expanded their care team model to include defined roles and protocols for pre-visit planning and care gap outreach across 3 locations. With the recent departure of the PHMI clinical lead, there is a lack of training and commitment. Their PHM platform enables access to data to inform outreach and care protocols, but there is not consistency in accessing it.



Their sustainability plan includes more hardwiring (protocols, training, workflow) in empanelment and care team model to better position themselves to roll out across all locations.



They are considering a **spread strategy** to move their outreach for care gaps protocol across all locations (9 primary care providers).

Case Study Prompts

Optimal Health Center is considering spreading their outreach protocol for HTN high-risk patients with care gaps across all locations.



1. Is this strategy aligned with their clinical goal?



2. Are their workflows and procedures that are followed consistently?



3. Is the PHM platform being optimized?



4. Are structures in place in place (leadership, champions?)

5. What recommendations can you make this to the team?

Next Steps

1. Jot down a few ideas that surfaced from this session on the Spread Worksheet.
2. Consider how to move through the steps outlined in the worksheet today (time permitting) and over this next month.
3. Draft Spread SMARTIE goal by 3/31.

PHM INITIATIVE
PHMI 2026 Spread Team Worksheet

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Thank you!