

Moving Towards Sustainability

Affinity Group Session #2

October 23, 2025

Welcome!



Welcome!

Please share:

- ✓ Your name, role and CHC

Group Agreements

- **Join with computer and turn on your video** - when you are able to.
- **Set the intention to be present.**
- **All teach, all learn-** we want to hear from you.
- **This is a safe space for reflection and learning.** We won't record breakout room discussions.
- **Be curious with ideas, gentle on people.**
- **Take space, make space** - balance your participation so everyone has a chance to be heard.

AG Webinar 2 Agenda

Agenda Item	Time
Recap AG Webinar 1 Series (9.25/10.3)	10 mins
Bright Spot: Alliance Medical Center	15 mins
Small Group Discussions	25 mins
Resources, Action Period & Pulse Check	5 mins

Recap AG Session 1 (9.25/10.3)

Why Develop a Sustainability Plan?

"It brings together the right people in the right room"

"This gives us dedicated time and structure to work on this!"

"Often well designed and effective QI initiative fall by the wayside. This plan helps us chart for the long term"

"It provides a way for us to show our leaders all the amazing work we have done!"

"We now know that we can continue the work so that we are not dependent on a staff member"

"Having a plan ensures we don't have to redo everything later. It helps us avoid delays and slip backs"

"We've put a lot of work in to date... we want to see the impact over time for the populations we serve"

"A sustainability plan matters because it ensures patients don't just see improvements for a year- they experience better care long-term"

Consolidated Sustainability Strategies

Empanelment (9 CHCs)

DQ&R including
pregnant people
registry

Enhanced Care Team
Models, Approaches
and Documentation

Integration BH, SDOH,
ECM and Community
Supports

Integrated Pregnancy
Coordination (CPSP
with clinical staff)

Enhanced SDOH
Screening using
PRAPARE

Enhanced Outreach for
Colorectal & HPV
Screenings

Outreach Strategies
(attributed not seen)

Communication
Strategies: Care Team
Guide, BH Resource
Guide, Colorectal
Screening Video

Business Case Tool

Webinar 1: Small Group Discussion Themes

- Create a culture of population health
- Use data and storytelling to elevate importance of strategies
- Tailor communication to different stakeholders
- Align the sustainability plan with the CHC's strategic plan
- Use project management to create and finalize the plan
- Make sure the right people are at the table
- Doing the sustainability plan at the same time they create their new strategic plan.

Bright Spot: Alliance Medical Center

Sue Labbe

CEO, Alliance Medical Center



PHM INITIATIVE

Your Snapshot: Alliance Medical Center

We are collaborating to improve the quality of care and address disparities for all patients and families served by California Community Health Centers.

Empanelment

Your health center put a policy in place to ensure every patient has a primary care provider. You have been working to balance patient needs with provider availability, and you have considered strategies to manage patient panels and improve population health, including identifying a dedicated panel manager to keep these efforts running smoothly.

Data Quality & Reporting

You built a strong foundation for using data to improve patient care. You established a dedicated team and clear processes to ensure your patient information is accurate and reliable. You can now track key quality measures (like those used by PHMI/HEDIS) and understand how well you're doing. By regularly checking your data for gaps and reviewing it quarterly by location and by race/ethnicity, you can gain important insights to provide effective and equitable care for all.

Business Case

Your health center laid out a clear plan for expanding your care team to ensure it meets the needs of your patient population. This was developed by a diverse team and received approval from your leadership, showing a strong commitment to these changes. You've also established a team to track the financial impact of these improvements, demonstrating a smart, sustainable approach to delivering better care.

Your Reimagined Care Team

Your health center has successfully created stronger connections between patients and their care teams. You've clearly defined who makes up your core care teams, ensuring they know their assigned patients well. This has allowed you to build out new team-based approaches that deliver more comprehensive and coordinated care.

You have defined and established four core care teams with a mix of providers, nurses, and other specialists, which have regular meetings to review data and ensure they are appropriate for the patients. You created screen savers and lobby TV boards with scripts developed with your Patient Advisory Council to help patients get to know their care teams. Your care teams can see their panels in Relevant, which provides real-time access to data and allows providers to see how they are doing with quality metrics.

Your Population of Focus Successes

Behavioral Health Integration: The integration of your behavioral health team, including ECM coordinators that are reporting to behavioral health, is highly advanced, to the point that you are pursuing NCOA certification. Your integration efforts are a lesson in culture change, involving a focus on a shared mission and core values.

Patient-Informed Improvements: You successfully engage your Patient Advisory Council to validate process improvements, using their feedback to refine your approach to patient experience and colorectal cancer screening materials.

Proactive Patient Engagement: You have an established outreach protocol, including a calendar, workflow, and scripting, to effectively reach and engage all attributed patients who are due for care.

Comprehensive Screening & Follow-Up: You have a well-established health-related social needs screening process at all new and annual visits, with CHWs following up on positive screenings.

Exemplary Clinical Guidelines: Your clinical guidelines policy for preventive guidelines has been recognized as a "bright spot" example in PHMI.

Optimized Tech: You have completed an assessment of your Health Information Technology (HIT) capabilities and are currently expanding smart sets within OCHIN Epic.

Alliance Medical Center PHMI Impact Story

Preschool Peter's Story

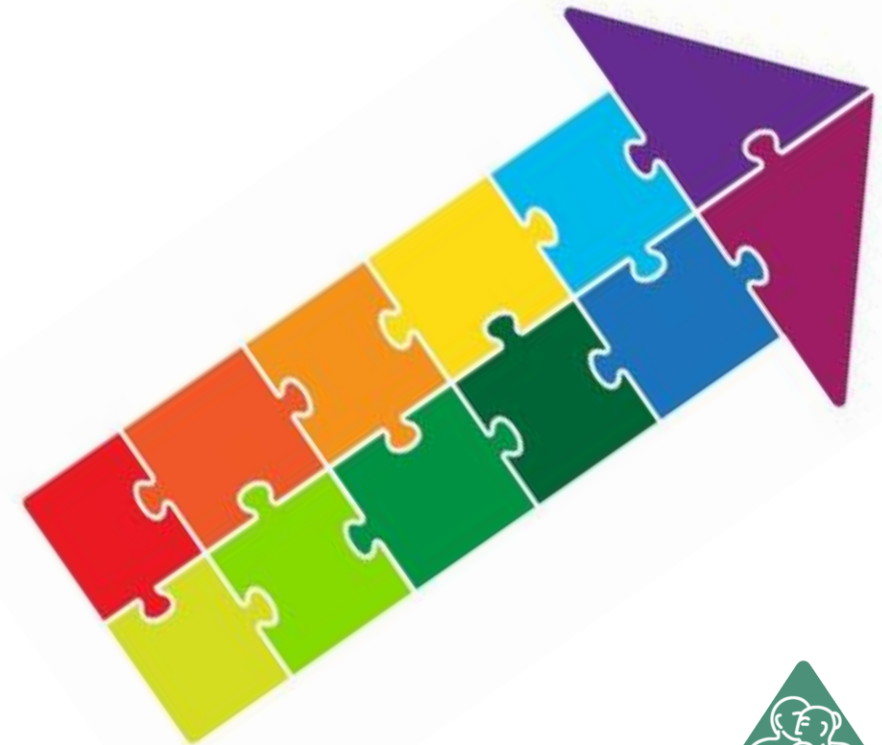
This was a family in crisis and a little boy suffering because of such early trauma...

...the care team knew that there was more to his story and took the time to do screening and review the social situation impacting this family.



Integrating PHMI Sustainability Strategies into AMC's 2026–2028 Strategic Plan

Strengthening Equity, Access, and Whole-Person
Care



Why This Alignment Matters

- PHMI work demonstrates successful innovation in access, integration, and care coordination.
- Aligning these strategies ensures sustained impact and prevents duplication of effort.
- Embedding PHMI initiatives into our Strategic Plan allows AMC to “hard wire” equity and whole-person care into every pillar.



PHMI Strategies and Strategic Alignment

PHMI Strategy	Core Impact	Strategic Plan Connection (Draft Themes)
Empanelment & Panel Management	Strengthens continuity, improves preventive care and chronic disease outcomes	Aligns with <i>Clinical Quality & Patient Experience</i> goals
Advanced Integration (SDOH, BH, ECM, ACEs)	Improves equity, cancer screening rates, and access to social supports	Aligns with <i>Equity & Integration</i> and <i>Population Health</i> goals
Care Team Nurse Roles (Flip Visits & CCM)	Expands provider capacity, standardizes chronic care management	Aligns with <i>Workforce Development</i> and <i>Access & Efficiency</i> goals
Access Strategies (No-Show Reduction)	Increases appointment utilization, improves operational efficiency	Aligns with <i>Operational Excellence</i> and <i>Access to Care</i> goals



Conditions for Sustainability

In Place	Areas To Strengthen
Leadership commitment and alignment with Medi-Cal payment reform	Stable funding for CHWs and trauma-informed training
Durable workflows embedded in Epic and QI structures	Expansion of CBO partnerships for closed-loop referrals
Staff engagement and cross-departmental ownership	Continued integration of equity metrics in performance dashboards

AMC's Draft Sustainability Plan

Part 1: Strategies to Sustain

Based on PHMI learnings and organizational priorities, AMC has committed to sustain the following strategies in 2026 and beyond:

- **Empanelment and Panel Management** – Strengthening panel management systems, dashboards, and workflows to ensure patients are attributed, tracked, and engaged effectively. Supports team-based care, population health management and proactive outreach.
- **Advanced Integration** – SDOH Screening & Referrals (with CHW integration), Behavioral Health Integration (warm hand-offs, collaborative care), ECM & Closed-Loop Referrals for Community Supports.
- **Care Team Nurse Roles & Access Strategies** – Flip Visits (RN prework) to prep for visits and increase provider capacity.
- **No-Show Policy & Documentation** (esp. BH/Dental), with tracking to reduce missed appointments.

Why These Were Selected

1. Align with AMC's mission of improving health and wellness for diverse communities.
2. Directly support our 2026–2028 strategic plan goals: advancing health equity, improving access, and integrating care.
3. Demonstrated early success under PHMI with measurable outcomes and strong staff/leadership support.

Process for Selection

- Identified during PHMI statewide learning sessions and AMC PHMI sustainability team workshops.
- Reviewed by care teams, panel managers, and executive leadership.
- Prioritized based on impact on access, quality, equity, and financial sustainability.

AMC used the Sustainability Plan Guidance to draft Part I (Strategies to Sustain) and Part II (Each strategy description, champion, conditions in place and resources to support

Small Group Discussions

Small Group Discussion Prompts

- What are you learning as you develop the sustainability plan as you seek input from staff, clinicians and leaders?
- What do you need/support to move forward?

10.23 Small Room Assignments

Room 1	Room 2
Mendocino Coast (Lyn)	NEVHC (Claire)
CMC (Lyn)	Valley (Denise)
Alliance (Lyn)	Eisner (Roza)
Long Valley (Lyn)	
Facilitator: Fiona	Facilitator: Stacey
Note Taker: Hithu	Note Taker: Jen

Action Period & Resources

Pulse Check

Please complete the poll questions.



Action Period 2

- Start/continue to draft the plan
- *Identify where you could benefit from help from colleagues*
- Consider the conditions that will need to be in place
- Consider how your story builds the culture of population health
- Continue to socialize the strategies with key stakeholders: staff, clinicians, leaders

Cohort Portal Resources

We have added some new resources!

- [October 2025 Sustainability Leadership Call Summary](#)
- [October 2025 Leadership Track Meeting on Sustainability Slides](#)
- [Sustainability Plan Outline](#)
- [Sustainability Leadership Presentation Template](#)

Thank You!