

CCBHC-E National Training and Technical Assistance Center

*Session 2: Leveraging Leadership to Develop and Deliver a Plan
for Transformative Care Design and Delivery*

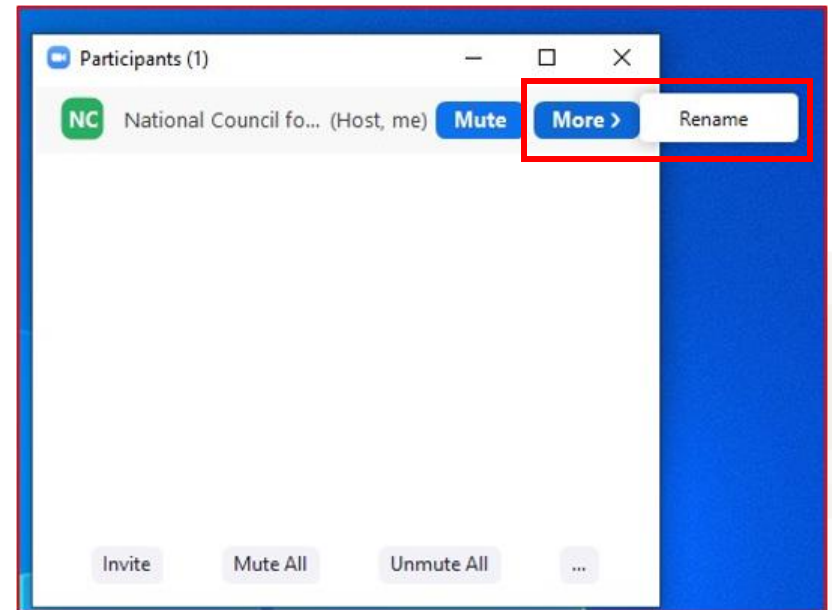
March 11, 2025

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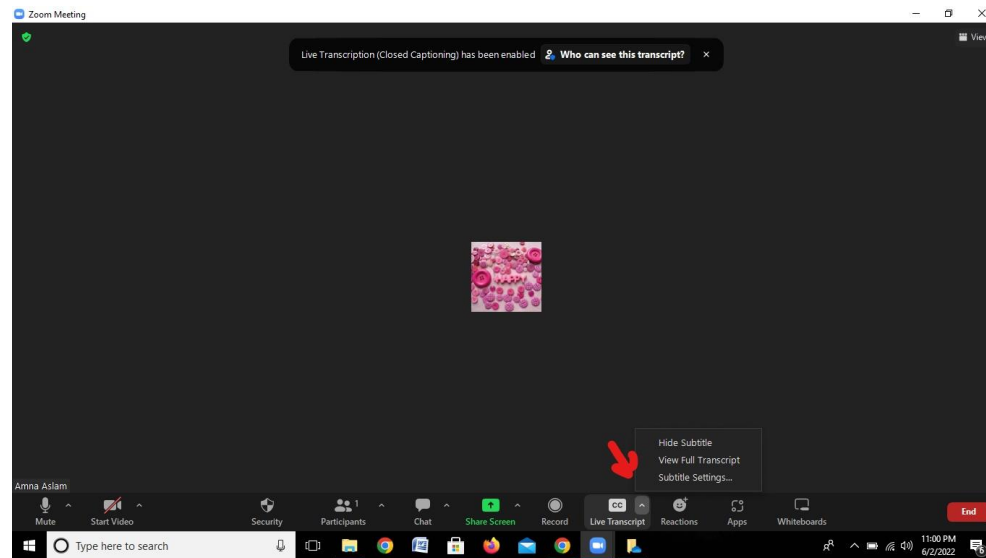
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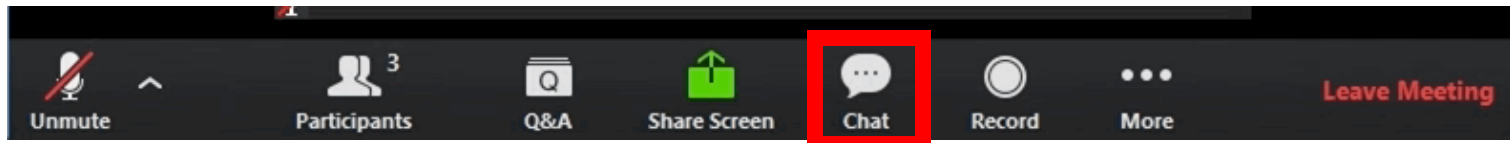
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Please share questions throughout today's session using the **Chat Feature** on your Zoom toolbar. **We'll answer as many questions as we can throughout today's session.**

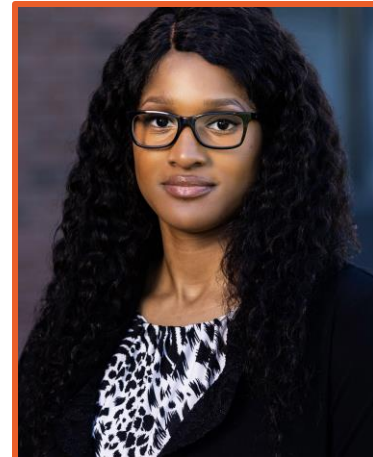
NTTAC Learning & Action Series Team



Jeff Capobianco, PhD
Consultant



Blaire Thomas, MA
Sr. Project Manager



Patricia Gayle
Project Coordinator

The Learning & Action Sessions

Date	Topic
February 11	Session 1: Setting the Vision for Transformational Change
March 11	Session 2: Leveraging Leadership to Develop and Deliver a Plan for Transformative Care Design and Delivery
April 8	<u>Session 3: Measure Twice, Cut Once – Using Data to Support Transformational Change</u>
May 13	<u>Session 4: Confronting fear as an Impediment to Transformational Change: Embracing the Challenges of Effective Change</u>

Today's Agenda

1

• Planning for Transformational Change

2

• Effectiveness in Transformational Leadership

3

• Addressing Culture & Climate

4

• Effective Interdisciplinary Team Collaboration

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Learning Objectives

Participants will learn:

1. Core elements of a transformative change plan including the charter, communication and work plans.
2. Identify characteristics of transformational leaders and how they facilitate effective change.
3. Identify core skills that align with effective leaders at all levels of the organization.
4. Explore the principles associated with effective interdisciplinary team collaboration in care design and delivery.

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Today's Presenters



Kerry King, PsyD, MBA, CCTP
Principal, Bowling Business
Strategies



Tom Petrizzo
CEO, Beacon Mental
Health



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Planning for Transformational Change

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The Executive Charter

1. Defines & Prioritizes Goals
2. Clearly states the Dates Goals will be Completed
3. Provides an Executive Communication Plan to Ensure Continuity of Messaging
4. Assigns Executive Staff Sponsors to the Workgroups
5. Assigns Workgroup Leads & Members
6. Details Resources Available to the Workgroup & How to Access More or Different Resources if Needed
7. Identifies Expected Risks & Associated Contingencies
8. Provides Procedures for Conflict Resolution

CCBHC Implementation Team – Notes Example

CCBHC Topic	Action Item	Person Resp.	Status	Reporting
Clinical – MAT	Complete Provider Training	Medical and Clinical Dir.	Training scheduled for May	To Medical Director
Staffing	Complete Staffing Plan	HR Director & Clin. Dir	Plan Complete	To CEO, DMH, and
Billing	Complete Codes Crosswalk	Billing Manager & QI Director	In Process – Target 6/1/17	To CFO, CEO
Outcome Measures	Complete Measures Chart	QI Director Data Analyst	In Process – Target 5/15/17	To QI, CEO, Clin Dir, and DMH

Effectiveness in Transformational Leadership

What Sets Successful Leaders Apart from Others

- Harvard Business Review (2017) identifies four specific behaviors that set successful leaders apart.
 1. They are Decisive – a partially right or wrong decision is often better than no decision.
 2. They Engage for Impact – understand priorities of stakeholders and align them around goal creation or alignment.
 3. They Adapt Proactively – keep an eye on the long-term while learning from mistakes.
 4. They Deliver Results Reliably – they steadily follow-through on commitments or follow-up.

CCBHC Leader Levels

- Executive – CEO, COO, Chief Clinical, Clinical Directors, CFO, HR, Development, and IT
- CCBHC Implementation Team -
 - Implementation Team Leads for Clinical (may be several), Financial, IT/Business Intelligence, HR/Staffing, QI/Compliance, Data Gathering and Reporting, and Peers
 - Clinical Team Leads – Adult, Child, Community, Assessment and Crisis, Medical, Peers, etc.

CCBHC Transformation and Successful Leader Behaviors

- Decisiveness – Making CCBHC implementation decisions promptly and with communication to all who need to know
- Engaging for Impact – Repeating the "Why" and the Vision when engaging in CCBHC planning and implementing; taking in all perspectives and priorities
- Adapting Proactively – Keep an eye on the long-term while achieving short-term goals and action steps. Remind group where we are going!
- Delivering Results – Completing Follow-up items promptly and stopping to acknowledge team accomplishments

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CCBHC Leaders are Decisive

- Decisiveness and the CCBHC Leader
 - Executive Level – Partnerships/Contracts w/DCOs, Service Line Changes, CCBHC Budget Approval and Changes, Staffing Needs, Starting EBPs, Large Resource Requests, etc.
 - Implementation Team Leaders – Adoption of Outcome Tools, Training Curriculum, Clinical Workflow Changes, Productivity Expectations, IT and Billing Code Changes, etc.
 - Clinical Leaders – CCBHC Client case assignments, Referrals to other service lines, Team Staff Needs and Support, Decisions based on consults w/family members and other providers.
- ***Don't let perfect get in the way of good...

CCBHC Leaders Engage for Impact

- Executive Level –
 - Engage w/CCBHC Vision and Big Goals
 - Remind yourself and others how CCBHC is going to promote service mission and service as a whole
 - Identify the priorities of each person you are engaging – what is their perspective and overall goal(s).
 - Assimilate all perspectives, balance with overall goals and align or engage based on creating value (seek small or large wins for all). May take more than one conversation or time to consider all aspects and information.

***Assume good intentions of stakeholders...

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CCBHC Leaders Engage for Impact

- Impact at the Implementation and/or Clinical Team Level
 - Constantly work to understand the priorities and needs of all stakeholders as you work through an implementation or work plan.
 - Acknowledge challenges, stressors, competing priorities as you align to create value and prioritize for most impact.
 - Remember timelines and items needing to be done by certain dates (may be priority based solely on deadline dates)
 - Note gaps in resources/needs and engage for filling gaps or volunteer to step in to assist.

CCBHC Leaders Adapt Proactively

- Executive Level -

- Keep long-term CCBHC perspective while acknowledging short term goals, challenges and achievements
- Acknowledge and take ownership of mistakes or erroneous paths taken and adjust course with reasons given.
- Listen to feedback (good, bad, additive) with open mind and consider adjusting to create value and move the needle on CCBHC Transformation.

CCBHC Leaders Adapt Proactively

- Implementation Team and Clinical Team Leaders -
 - Keep eye on CCBHC Work Plan goals or Operational Items to be accomplished.
 - Assess and re-assess goals based on changing conditions, resources and priorities
 - Provide feedback and recommendations to leadership with reasons for change in direction or course correction.
 - Acknowledge errors or missed opportunities and steps for correction and learning (We tried X or Y and that did not work because....)

Successful Leaders Deliver Results

- Executive Level -
 - Remember Large Organizational CCBHC Goals – Meeting grant goals, CCBHC Certification, Clinical, Financial and Staffing Enhancements
 - Follow-through on your commitments and promises to teams, community, clients and peers
 - Report progress steadily and regularly (all staff email updates, CCBHC feature in Newsletter, Recognitions and Milestones)

Successful Leaders Deliver Results

- Implementation and Clinical Team Levels -
 - Keep your own CCBHC To Do List and Note items accomplished and report that to team members and leadership
 - Follow through with reminders about items still to be done and note progress and/or completion
 - Be transparent in communication and include all who need to know
 - Report results regularly and steadily – have regular update time

Note – go through notes from previous meetings and implem.
Plan and mark things accomplished!

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Addressing the Organization's Culture & Climate

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Preconditions of Adaptive Leadership

“...the practice of mobilizing people to tackle tough challenges and thrive.”

- Address alignment, not dysfunction
 - Jeff Lawrence: “There is no such thing as a dysfunctional organization, because every organization is perfectly aligned to achieve the results it currently gets.”
- Embrace the Disequilibrium
 - Task 1: Manage yourself
 - Task 2: Help others tolerate the discomfort
- Engagement Above & Below the Neck
 - “Courage requires all of you: heart, mind, spirit, and guts. And skill requires learning new competencies.... ”
- Connect to Purpose
- Clarity in values; What is worth the sacrifice?

Modified from Grashow, Linsky & Heifetz, 2009

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Queries for Adaptive Growth

1. Why do I believe what I believe?
2. How could I be wrong?
3. What do I do next?

Leadership Mindset Traps

1. Beware the simple story
2. The bias of rightness
3. Rush to agreement
4. Control compulsion

Turning Reluctant Leaders Into Champions

- Bought-in leaders are active champions who help drive progress, foster buy-in in others and support process transformation.
- Common Challenges Include:
 - Resistance to change
 - Lack of clear communication
 - Differing opinions on priorities

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Turning Reluctant Leaders Into Champions

- **Effective Strategies:**

- Make the vision clear, compelling & concise using data, narratives & examples
- Include leaders in shaping the vision & strategy
- Be transparent about intentions & challenges
- Demonstrate integrity & competence
- Address concerns openly & without resistance
- Reiterate the benefits of the vision and downsides of not taking action

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Turning Reluctant Leaders Into Champions

1

Show proof
with data
analytics

2

Demonstrate
value quickly

3

Use social
proof

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Effective Interdisciplinary Team Collaboration

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Teams as a Standard of Care

“The high-performing team is now widely recognized as an essential tool for constructing a more patient-centered, coordinated, and effective health care delivery system.”

Source: Mitchell, P., M. Wynia, R. Golden, B. McNellis, S. Okun, C.E. Webb, V. Rohrbach, & I. Von Kohorn. (2012). *Core principles & values of effective team-based health care*. Discussion Paper, Institute of Medicine, Washington, DC. www.iom.edu/tbc. P.5.

“There is near consensus that community-based integrated and comprehensive psychiatric services performed by interdisciplinary teams constitutes the gold-standard for the care of patients suffering from mental illness.”

Source: von Peter, 2018

**National Committee on Quality Assurance (NCQA)
Patient Centered Health Home (PCMH)
Requires
Team-based Care**

See: <https://www.ncqa.org/programs/health-care-providers-practices/patient-centered-medical-home-pcmh/pcmh-concepts/>

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The Case for Collaboration

- **Increased access** to services (WHO, 2010).
- **Improved quality of life and symptom control** for people receiving services (Kane, 2015).
- **Improved satisfaction** of people receiving services, including greater acceptance of treatment (WHO, 2010).
- **Improved continuity of care** (von Peter, 2018).
- **Decreased suicide rates** (von Peter, 2018).
- **Increased provider satisfaction** (von Peter, 2018).
- **Reduced total costs** (WHO, 2010)

Source: National Council, 2020

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What gets in the way?

- Uncertain Rationale for Change
- Professional Silos
- Communication
- Time
- Allocation of Resources

Building Effective Collaboration

- Define goals and develop shared aim
- Focus on impact on person- & family-centered care
- Define specific, measurable outcomes & objectives
- Assign roles for each team member and define and delegate functions & tasks
- Ensure that each team member is competent to perform their role
- Train on collaboration & ensure that clinical and admin systems support team members in their role
- Create communication structures & processes; Use technology to support
- Use data to assess team progress & performance
- Practice teamwork
- Share learning

Adapted from Cambridge Health Alliance

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Psychological Safety has measurable impacts. It's worth the effort!

27% reduction in turnover

40% reduction in safety incidents

12% increase in productivity



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Prioritization (Conservation) of Resources and Burnout

- Loss of resources is more impactful than resource gain
- New initiatives promise resource gain but also impact utilization of current resources
- More losses than gains (perceived or actual) leads to stress
- Burnout: "...a psychological process, whereby chronic exposure to professional stress increases emotional exhaustion, leading to depersonalization, decreased feelings of personal accomplishment..."
- Burnout can be reduced by helping team members better leverage resources

Preventing and Managing Burnout



Collaboration overload is a real thing!



How do you incentivize and benefit from collaboration without spending your days in 'teaming' and 'coordination' meetings?



Burnout can come in various forms – physical, emotional, behavioral



How do you proactively identify and address the root causes of change fatigue and burnout in a helping profession?



You and your staff need to show up for the people you serve so managing burnout is even more important in this field



Culture can contribute, encouraging self-care, asking for help/support, regular check-ins

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Support for Leadership Development

- Formal Leadership Development Training
- Leadership Assessment
- Executive & Managerial Coaching/Mentoring
- Peer Support
- Culture and Climate Analysis – Organizational Coaching

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Key Takeaways...

- Know and grow your leadership style
- Prioritize efforts (You cannot do it all at once or alone.)
- Be clear on your change management strategy
- Focus on/design the change initiative to address staff and consumer needs
- Have a communication plan that engages all stakeholders bidirectionally
- Be deliberate in skill-building and support fidelity
- Prioritize safety
- Understand the journey is the destination but stakeholders need to take in the view along the path from time to time and need reminders on why the journey remains important.

Thank You

Please take a moment to share your feedback in the
Post-Webinar Survey.

It will pop up once the Zoom session is closed.

CCBHC-Expansion Grantee National Training and Technical Assistance Center

We offer CCBHC grantees...



Virtual Learning Communities, Webinars and Office Hours

Regular monthly offerings that are determined based on grantees expressed needs.



Opportunities for Collaboration with Other Grantees

Monthly Peer Cohort Calls for CCBHC Program Directors, Executives, Evaluators and Medical Directors.



Direct Consultation

Request individual support through our website requesting system and receive 1:1 consultation.



On-demand Resource Library

Includes toolkits, guidance documents, and on-demand learning modules.

➔ Access our website to register for upcoming events, submit a consultation request or scan our on-demand resource library:
<https://www.thenationalcouncil.org/program/ccbhc-e-national-training-and-technical-assistance-center/>

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