Welcome to Today’s Webinar
Learning Outcomes

• Discuss the purpose and standard components of the PHAB site visit;

• Describe effective strategies for preparing health department staff members for the site visit;

• Describe effective strategies for preparing community partners and stakeholders for the site visit;

• Discuss practical ways to maximize the outcome and benefits of the site visit.
Today’s Webinar
Presenters
Brittan Williams
PHAB Accreditation Specialist
Mimi Ujiie
Utah Department of Health
During the presentation, enter your questions into question box on the control panel to the right of your computer screen. Questions will be addressed in the discussion period following the presentations.
The Site Visit: Insights from PHAB
Brittan Williams, PHAB Accreditation Specialist
Purpose of the Site Visit

• Provides Operational Context of Documentation
• Verify Documentation Submitted
• In-person Discussions
• Direct Observations
• Learn about Governance and Partnerships
Scheduling the Site Visit

• Setting the Dates
  • Typically 2 days in length

• The Health Department will determine who will participate in each session

• Health Department Director and Accreditation Coordinator must be present for the entire Site Visit
Travel

• PHAB will ask the Accreditation Coordinator for recommendations
• PHAB is responsible for getting the Site Visit Team to and from the health department
Breaks and Meals

• Health Department may not purchase meals
• Providing break type items is acceptable (snacks and drinks)
• Provide menus to nearby restaurants
• No evening socialization or gifts
Preparing for Interviews

• Prepare all who will be interviewed
  • Health department staff
  • Community partners
  • Governing entity members
• Know the reason for the site visit
• Know the reason they are being interviewed
• Be familiar with documentation in ePHAB
Role of the AS During the Site Visit

• Coordinates any logistical needs of the Site Visitor Team
• Handles any process and interpretation questions
• Reopens measures in e-PHAB to request additional documentation
• Attends interviews as an observer
Private Room for Site Visit Team

• Home base available to the Site Visit Team
• Used for breaks, lunch, and Executive Sessions
• Work table for computers and notes
• Provide Wi-Fi connections
Rooms for Interviews

• Private meeting rooms for concurrent sessions
• Enough chairs for all participants
• Interview rooms must have Wi-Fi
• Outlets or Power Strips
Additional Documentation

• Site Visit Team may ask for additional documentation
• Must be submitted electronically
• Documentation must be dated on or before original documentation submission date
• Current budget and organizational chart
• Requests will be specific and based on conversations
• Health Director must submit prior to the start of the final Executive Session
Developing the Site Visit Agenda

• Agenda drafted and shared with AC
• Organized by Domain
• Health Department will select participants
• Customized to address areas of focus and meet scheduling needs
Standard Site Visit Agenda Items

• Entrance Conference
• Health Department Walk-Through
• Meeting (interview) on CHA/CHIP
• Meeting (interview) on Strategic Plan
• Concurrent Domain interviews
• Meeting with key community partners
• Meeting with governing entity reps
• Meeting with the Health Department Director
• Executive Sessions of Site Visit Team
• Exit Conference
Entrance Conference

• Introduction
• PHAB policies
• Purpose of Site Visit
• Talking points/guidelines
• Brief overview of the Health Department
Walk-Through of the Department

• Overall Picture of the Health Department
• General Lay-Out and Space
• Visual Observations
  • Interior/exterior branding and signage
  • ADA compliance/physical accessibility
  • Provision for hearing and visually impaired
  • Use of technology for public health functions
• Clean, safe, and secure
Interviews

• Purpose is to verify evidence and clarify content
• Open and frank discussions
• Key Community partners (up to 20)
• Representatives of the Governing Entity (~2-3)
Executive Sessions

• Held throughout the Site Visit
• Time of discussion
• Time to develop Exit Conference comments
• No Health Department staff may be present
Exit Conference

• Final session of the Site Visit
• No recommendation on Accreditation Status
• Site Visit Team’s overall impressions, including greatest strengths and greatest opportunities for improvement
• Review Next Steps
Preparing for Site Visit

MIMI UJIIE

Performance Improvement Manager / Accreditation Coordinator

Utah Department of Health
About Utah and Department of Health

- Population of Utah: ~ 3 million
- Unique characteristics:
  - Youngest median age
  - Most persons under 18 years
  - Largest household size
  - 2nd highest fertility rate
- Decentralized state with 13 regional and county LHDs
- 8 federally recognized Tribes
- ~1,200 Employees
Site Visit Objectives

• Site visitors will:
  • Verify the accuracy of documentation submitted by the health department;
  • Seek answers to questions regarding conformity with the standards and measures; and
• An opportunity for discussion and further explanation
Visualization

Positive Learning Experience
ASTHO Grant

Technical assistance

• Mock Site Visit
  • Priority given to states that had not received TA from ASTHO in last two years
  • Need-based
    - UDOH experienced 100% turn over of executive team during the accreditation process
Not All Heroes Wear Capes
Learning Opportunity

• Reframing message
  • Take out defensiveness and anxiety
• Held weekly ‘sharing’ brown bag lunch session
Site Visit Date Confirmed

• Announce site visit dates to staff
• Secure meeting rooms (one site visitors’ homeroom and three conference rooms on same floor)
• Identify governing entity representatives and community partner representatives
• Send ‘save the date’ email to governing entity and community partner representatives
Establish Domain Team

- Identify the subject matter experts (SME) - Domain Leaders
- Identify two note takers for each session - AC
- Send SME and note takers’ names to the AC - Domain Leaders
- Send SME and note takers calendar invite for site visit (Sept 7 & 8, 2017) – Domain Leaders
  - Verify the calendar invite – AC
- Print out all documents uploaded to e-PHAB and create a binder - Domain Leaders
- Create index page - Domain Leaders
**Index Page Example**

**Standard 5.2 - Conduct a comprehensive planning process resulting in a Tribal/state/community health improvement plan.**

**Measure 5.2.1 S - A process to develop a state health improvement plan**

**Purpose:** to assess the state health department’s collaborative community health improvement planning process and the participation of stakeholders

| RD 1 | 
| State health improvement planning process that included: | a/b/c: SHA/SHIP Preliminary Meeting Notes & Slides (State Health Improvement Plan (SHIP) Guidance and Resources by ASTHO) |
| a. Broad participation of community partners | 
| b. Information from community health assessments | c/e: Report to HAC |
| c. Issues and themes identified by stakeholders in the community | Navina, Heather, Mimi |
| d. Identification of assets and resource | |
| e. A process to set health priorities | |

**Measure 5.2.2 S - State health improvement plan adopted as a result of the health improvement planning process**

**Purpose:** to assess the state health department’s state health improvement plan. While some or many programs in the state health department may have program specific plans, they do not fulfill the purpose of the state health improvement plan, which looks at population health across programs and across the state.

| RD 1 | 
| State health improvement plan that includes: | SHIP 2012 & 2015-2016 |
| a. Desired measurable outcomes or indicators of health improvement and priorities for action | Navina, Heather, Mimi |
| b. Policy changes needed to accomplish health objectives | |
| c. Individuals and organizations that have accepted responsibility for implementing strategies | |
| d. Consideration of Tribal, local, and national priorities | |
Set Agenda

• Draft agenda and send to PHAB for approval – AC
• Finalize agenda – AC
• Distribute agenda - Domain Leaders & AC
Prepare Domain Teams

• Schedule and provide a workshop that explains the site visit to all SMEs and note takers - AC
• Provide SME access to e-PHAB - AC
• Go over each document with each SME and domain leaders (x12 domains) - Domain Leaders & AC
• Check to see if you have right people on the team - Domain Leaders & AC
Site Visit Interview Tips

Site visitor is in charge
- Site visitor runs the discussion
- A place for a dialogue
- Don’t be argumentative
- Avoid using acronyms

Be comfortable w/ silence
- Give site visitor time to take notes
- No need to fill ‘silence’
- Don’t contradict each other
- Don’t overshare

Prepare to talk about:
- Processes
- Strengths & weaknesses in each domain
- Alignment of plans
- Continuing the work included in examples
- Overall philosophy of department
be.  
here.  
now.
Prepare External Stakeholders

Governing Entity and Community Partners

• Send official invitation (via email and USPS) – AC / ELT
• Create information packet - AC
• Provide information session - AC
Governing Entity Support
Walk-Through Preparation

- Plan and organize route - AC
  - Measure 3.2.2 A, RD 1: Show live intranet, Healthnet
  - Measure 3.2.5 A, RD 3: TTY or other assistive technology demonstration
  - Measure 11.1.7: Clean, safe, accessible, and secure facilities
  - Measure 11.1.6 A, RD 1: Demonstration of IBIS (database)

- Rehearse the walk-through - ELT
- Draft talking points for Executive Director - AC
Entrance Conference Preparation

- Create PowerPoint and talking points for Executive Director, Director of Communication
  - Utah’s public health uniqueness
  - UDOH and Tribes of Utah Consultation & Conferment Process Policy
  - UDOH’s philosophy re: Community Engagement Approach
- Print handouts
“We enjoy collaborative relationship with our partners because we don't prescribe how we should work together. We share the rights and responsibilities among all members (underlined is a part of 'The Cultural Complementarity Model' which includes giving them a choice to choose the engagement model)

We use variation of these models or some elements of these models to work with our partners and remain flexible to accommodate their voices:

- Communities That Care
- MAPP
- Asset Based Community Development
- The Cultural Complementarity Model
Site Visitors’ Homeroom

• Schedule a room with a lock and electrical outlet; make duplicate keys - AC

• Provide water bottles with UDOH logo from Employee Appreciation Day (washed and ready to use) - AC

• Gather useful promotional materials (i.e, sticky notes) - free to public items only

• Order extension cords for site visitors’ laptops

• Provide ‘Emergency Response Guide’ and mouse pads with emergency contact info

• Provide office supplies (i.e., pens, sticky flags, note pads)
Final Preparation

• Fill out forms for site visitors’ security badges - AC
• Email security badge forms and agreement to Accreditation Specialist - AC
• Set up rooms
  • Set up a table and chairs for site visitor and PHAB Specialist (near electrical outlet)
  • Count the maximum number of SMEs; set up room accordingly
  • Provide a table and two chairs for note takers
• Create tent name cards for each session and place them in each room
• Post ‘Site Visit in Session – Do Not enter’ and ‘No Phone Allowed’ signs on all doors – AC
• Distribute agenda to ELT (use colored paper for hard copies) – AC
• Ready to upload the current year’s budget and most recent org chart - AC
PR Opportunity

• Mini-guide book - AC
  • Where to stay/eat
  • How to get around town

• QI posters – not accomplished
Major Kink in Plan

• Governor’s Operational Excellence Conference
All documents mentioned in the slides can be found at:

https://drive.google.com/drive/folders/115fI5cBFxiaWwLGTE5i9yhRgF1_Mp-k?usp=sharing

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PHAB SITE VISIT

August 15, 2018

Jennifer Valentine, MSN, RN
Knox County Health Department
Knoxville, Tennessee

• Population: 450,000
• Employees: 276
• Local health department
• Decentralized
• Jurisdiction served: urban, rural, suburban
VISION
Every Person,
A Healthy Person

MISSION
To encourage, promote and assure the development of an active, healthy community through innovative public health practices
Accreditation Timeline

- Documentation submission
  - Start date: 11/25/2013
  - End date: 11/25/2014
- Site visit: 7/28/2015
- Accredited: 11/10/2015
Pre-Site Visit Preparation

KCHD Staff

• Utilized monthly staff in-service
• Dedicated one month for each domain
• Domain leads/teams were responsible for planning and providing the in-service on their assigned domain

• Once site visit was scheduled:
  • Quick review
  • What to expect
  • Future steps
Pre-Site Visit Preparation
Accreditation Committee

• Accreditation Committee membership consisted of KCHD directors
  • Subject matter experts
  • Included staff from all levels of the organization
  • Potential documentation presented for vetting

• Once site visit was scheduled, Accreditation Committee meetings were held to prepare for site visit interviews
  • Each domain lead was responsible for preparing and leading the domain site visit interview.
Pre-Site Visit Preparation

Mock Site Review

• Funding provided by the University of Tennessee Department of Health though Academic Health Department relationship.

• Seven public health representatives from seven Kentucky health departments.

• Reviewed documents and provided feedback over two days.
Pre-Site Visit Preparation
Governing Entity, Community Partners, and Stakeholders

- One-on-one meetings
- “Save-the-date” reminders
- Interview tip sheets
- Involved from the start
Staff Interview Preparation

• Interview tip sheet
• Keep it simple
• Verify-Clarify-Amplify
• Key messages
  • Thought of in advance
  • Short and easy to understand
  • What do you want the site visitor to take away from the interview
Pre-Site Visit Logistics

• Worked with KCHD IT to ensure computer capabilities
  • ID/WI-FI badges/door codes
• Performed “spring cleaning” across the organization
• Provided “lite” refreshments
• Created tent cards and welcome packets
Overall Site Visit Tips

- Be flexible
- Show off your good work
- AAR with Accreditation Committee
- Have fun
- Relax
- Remember... its all about becoming better
Ongoing Benefits of Site Visit

• Received an outside, unbiased perspective.
• Strengthened camaraderie among KCHD staff.
• Highlighted strengths and opportunities for improvement.
• Increased staff motivation to keep improving and moving forward.
• Helped staff see the overall benefits of hard work.
• Intensified teamwork and attitude of “we are all in this together.”
• Motivated to become even more innovative and progressive.
• Strengthened organization culture of quality improvement.
Maximizing Outcomes

• Visualizing the future direction of the organization.
• Improving organizational alignment.
• Maximizing our identified strengths.
• Moving beyond stagnation and embracing a culture of change.
• Seeking constant organization growth.
Our Journey...
Contact Information

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This has been a presentation of Knox County Health Department.

Every Person, A Healthy Person.
Questions?
Thank You!

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