

Division of Services Improvement, Clinical Technical Assistance Project
Targeted Capacity Expansion: Technology-Assisted Care (TCE-TAC)
The Centers, Inc.
TA 4085: Information Technology Strategic Development Call
November 5, 2014 • 2:00 pm ET

Submitted to: Dantrell Simmons and The Centers, Inc.

Date of Submission: November 6, 2014

Participants:

Substance Abuse and Mental Health Services Administration (SAMHSA): Dantrell Simmons

The Centers: Richard Brown, Tim Cowart, J.D. McFarland, and Alma Rosario

JBS International (JBS): Dave Wanser and Leslie McElligott

Meeting Purpose:

The purpose of the call was to review the draft agenda and priority topics identified by The Centers team in preparation for the onsite health information technology strategic planning session on November 17 (as part of technical assistance request 4085).

Dantrell Simmons (SAMHSA) introduced himself as The Centers' new Government Project Officer. Dina Passman (SAMHSA) will work with Dantrell to transition into the role.

Discussion:

Dave Wanser (JBS) remarked that the draft agenda and priority topics supplied by The Centers were very complete and will serve as a launching point to frame the organization's health information technology action plan.

The Centers will use time during their next leadership meeting (November 11) to take a closer look at the priority topics they developed. Specifically, the team will determine the topics of highest importance.

Morning Session

To kick off of the meeting, Dave will provide a brief overview to help participants understand the value of the strategic planning session. His presentation will explain why the exercise is necessary before jumping into what should be included as part of the plan.

When developing an action plan, The Centers will need to consider their external landscape; namely, any pressures that may impact the organization's ability to translate the plan into reality. Such competing interests may influence staff time and other resources necessary for successful implementation. The Centers must consider factors such as (1) what is actionable and by whom? and (2) what non-technology-related factors will influence technology adoption?

Also central to the action plan will be the organization's budget and how existing resources (financial and other forms of capital) can be leveraged to expand capacity.

During the morning session, the team will focus on the following items:

- ✓ What is the purpose of developing an action plan?
- ✓ What are the key elements to focus on?
- ✓ What are the drivers of change and other organizational influencers?
- ✓ What will the governance / cross-functional workgroup process look like?
- ✓ What are the organization's goals /objectives around technology adoption?
- ✓ What changes should be made to accommodate technology adoption (e.g., investments, training, workflow)
- ✓ What is the organization's current capacity for technology?
- ✓ How does the organization plan to use Internet, social media, and other consumer-focused technologies?
- ✓ What is the roadmap for using analytics to inform care?
- ✓ What is the IT support plan to manage additional functionality?
- ✓ How will the organization pay for expanding and/or updating their technology platform?
- ✓ How will the different data systems be aligned?

Afternoon Session

During the afternoon session, staff will focus on budgeting, structural changes, and metrics. The goal will be to develop a functional action plan draft in advance of the meeting with The Centers' board at 4:00 pm. The team will consider their strategy for sharing the plan with the board at 3:30 pm.

Other Considerations

It will be helpful to understand areas in which there might be hesitation or ambivalence. Communication and buy-in among the leadership team, for example, will be key to managing and overcoming staff resistance and should be included as part of the plan.

The procurement process is a major component of selecting a new electronic health record (EHR). There are a number of best practice materials that can help with choosing the right system. Any plan to replace or improve an existing EHR must ensure the capability of the system to deliver sophisticated analytic capabilities.

Security is another important area of consideration. The organization will need to demonstrate that its platforms meet strict privacy standards as determined through audits and attestations.

Next Steps

Dave will share a copy of his draft presentation by the end of the week. He would like feedback to determine the content that is most appropriate for the board's consideration.

Dantrell will coordinate a touch-base call with The Centers in the near future.