## Project Description / Purpose

|  |  |
| --- | --- |
| **Project Name:** | *Community Cares Utilization and Data Management* |
| **Clinic:** | *A New Leaf* |
| **Process:** | *Monitoring and reporting referral data for improved utilization and outcomes.* |
| **TIP 2.0 Process Milestone:** | *Connect to and demonstrate effective use of the statewide closed loop referral*  *system (Community Cares), or other closed loop referral system(s) that can report*  *referral-level details, to connect members seen to community resources.* |
| **Project Description / Purpose** | |
| *Enter a brief description of the project, the purpose for conducting the project and a general description of what is*  *expected to result from the project.*  *Our agency utilizes Community Cares closed loop referral system to connect members to community resources. This*  *referral platform was launched across programs in January 2023 . During the first implementation phase in our agency,*  *staff were provided access, trained, and a high level oversight and monitoring was occurring as we adopted the*  *platform into several programs. The agency has since been using the system more regularly and data reporting and*  *metrics have become available recently through a Workforce Management Dashboard. Our project is for*  *Management/Director level staff to understand, utilize, and be able to monitor outcomes for their programs utilizing*  *the new dashboard and reports available. Information and data can then drive process improvements and efficiencies,*  *help identify gaps in services, and create potential networking opportunities that benefit clients and programs.* | |

## Project Overview

|  |  |
| --- | --- |
| **Problem Summary:** | *Enter description of problem or performance gap identified here. Include descriptions of*  *the impact to staff and/or patients.*  *Since adoption and implementation of Community Cares, there has not been a*  *consistent and efficient process to monitor staff usage of the system and outcomes of*  *referrals submitted/received.* |
| **Desired Outcome(s):** | *Describe the desired outcome(s) of the project*  *The agency will fully utilize the data reporting system, Workforce Dashboard, to*  *monitor staff usage and outcomes of referrals submitted/received.*  *Management/Director level staff will be trained and able to run, monitor, and evaluate*  *data and reports that may improve processes, identify gaps in services, and create*  *standards for staff utilization.* |
| **Benefits:** | *Enter a description of the expected benefits here*  *By having reports and data that are understood and monitored by managers/directors,*  *this provides oversight on many levels. Standards can be created for staff that holds*  *them accountable for utilization and follow through on referrals for clients, supervisors*  *are monitoring and managing outcomes for their staff and programs, and leadership is*  *able to clearly understand any gaps in services or resources.* |

## Timeline

|  |  |
| --- | --- |
|  | **Description of Task and Completion Dates** |
| **Task 1** | *Training on Workforce Dashboard for Directors to understand capabilities and functionality of reporting*  *system. Training completed with Sebastian Blackwell, Customer Success Executive for Unite Us, on*  *6/5/24* |
| **Task 2** | *Review monthly reports that will be ran and data to be reported to leadership monthly. Create a guide*  *for the agency that outlines reports and required monitoring timeframes. Completion date of 7/15/24* |
| **Task 3** | *Collaborate with Directors to determine staff utilization standards for each program and communicate*  *expectations to staff. Completion date of 8/15/24* |
| **Task 4** | *Provide update on project at Senior Leadership team meeting which includes standards, monthly*  *outcomes, and any process improvement needs identified. Completion date of 9/9/24* |
| **Task 5** | *Review quarterly data at Director meeting to identify gaps in services and resources, and networking*  *opportunities. Completion date by 9/20/24* |

\* Add new rows as needed.

## Project Scope

|  |
| --- |
| **In Scope Project Objectives** |
| *Enter a description of the objectives that are in scope here.*  *All tasks that are currently scheduled are in line with our scope of work and relative to our Milestone for T.I.2.0.*  *Connecting clients to resources and making referrals for HRSNs (internal and external), utilizing the Community*  *Cares referral system, and monitoring staff, program, and client outcomes through an efficient and effective*  *reporting system.* |
| **Out of Scope Project Objectives or Activities** |
| *Enter description of the objectives or activities that are out of scope here.*  *Our project extends to all A New Leaf programs and not limited to the program included in T.I. 2.0.* |

## Project Team

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Lead:** | Kim Briggs | **Project Champion:** |  |
| **Process Owner:** | Kim Briggs | **Process Manager:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Stakeholders** | | | |
| **Stakeholder** | **Title** | **Department** | **Organization** |
| Kim Briggs | Kim Briggs | Kim Briggs | Kim Briggs |
| Kim Briggs | Kim Briggs | Kim Briggs | Kim Briggs |
|  |  |  |  |
|  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Project Team Members** | |  |
| **Name** | **Team Role** |  |
| Kim Briggs | Kim Briggs |  |
| Kim Briggs | Kim Briggs |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Signatures

|  |  |
| --- | --- |
| **Process Owner** |  |
| **Project Champion** |  |
| **Team Leader** |  |