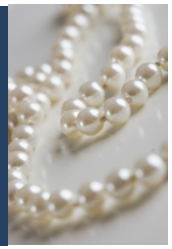
Pearls of Wisdom

Public Health Accreditation Board (PHAB) Site Visitor Insights

Presented by:
Susan Ramsey, PHAB Site Visitor
Pearls of Wisdom Consulting, LLC
sramsey_1@comcast.net
253-606-0956

What You Should Expect



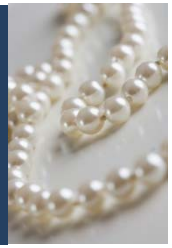
- Thorough and rigorous review
- Comments in areas where applicants excel
- Recommendations where improvements should be considered

We are learning a lot about your agency in a short period of time

Tip #1 – READ – READ - READ

- Take the time to carefully read the Standards and Measures
- Review what PHAB is requesting
- Is it asking for you to describe WHAT was done? HOW it was done? Or WHO was involved in getting it done?
- Version 1.5 is clear on the number of examples needed for each measure

Tip #2 – More is Not Always Better



- For many measures, an excerpt is acceptable; reviewers can always ask to see more
- Avoid tossing in extra examples – give us your best. To provide more is excessive and confusing; bogs down the review process
- Free-standing documents preferred to buried in reports
- Want to avoid “Scroll-down fatigue” by reviewers
- Submitting links are good – make sure they are active

Tip #3 – Use the Document Description Feature

- Site Visitors really do read these!
- Use to “point” to where in the document the evidence is located
- Give details on which element of the measure the documentation serves as evidence

Required Documentation 1.

Documentation that a coalition/network/council is working on collaborative processes to reduce barriers to health care access or gaps in access

Guidance:

The health department must provide one example that demonstrates its involvement in a collaborative process for developing strategies to improve access to health care. The example must also demonstrate involvement of the health care system. The collaborative process and development of strategies in this measure can be done in conjunction with 7.1.1, and the same collaborative process/partnership can be used.

The documentation must demonstrate that the group is actively working to identify strategies. Documentation could include: a charter for the group; membership rosters or participant/attendance lists; meeting agendas and minutes; or workgroup reports, work plans and white papers.

DOCUMENTATION	TITLE	UPLOADED BY
Document 7.2.1 A.1.1	Access to Care Action Plan 2010	101 Brittan Wood 08-03-2012
Document 7.2.1 A.1.2	Access to Care Talking Points	101 Brittan Wood 08-03-2012

This document was developed for the members of the ABO Health Care Coalition. It is to help guide our discussions and to provide information and requests from funders and stakeholders.

Required Documentation 2.

Development of strategies through the collaborative process to improve access to health care services

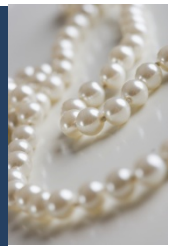
Guidance:

The health department must provide written reports or meeting minutes that include identified strategies that the group developed together to improve access to health care services.

DOCUMENTATION	TITLE	UPLOADED BY
Document 7.2.1 A.2.1	Access to Care Annual Report	101 Brittan Wood 08-03-2012
	Agreement for Nurse Practitioner	101 Brittan Wood

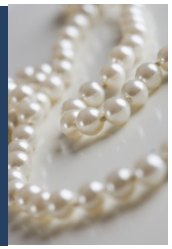
Required Documentation	Guidance
1. Health department strategic plan dated within the last five years that includes:	1. The health department must provide a strategic plan that is dated within the last five years. Some health departments may have shorter planning timeframes and, for example, may produce a strategic plan every three years. Some of the goals in the plan may be for a longer time period than five years, but the plan must have been produced or revised within the last five years. The health department may not officially call the plan a "strategic plan," but it must include the items listed in a through f. There is no required or suggested format for the strategic plan. There is no required or suggested length of the strategic plan. The strategic plan must include all of the following:
a. Mission, vision, guiding principles/values	a. The health department's mission, vision, and guiding principles/values for the health department
b. Strategic priorities	b. The health department's strategic priorities
c. Goals and objectives with measurable and time-framed targets	c. The health department's goals and objectives with measurable and time-framed targets (expected products or results). Measurable and time-framed targets may be contained in another document, such as an annual work plan. If this is the case, the companion document must be provided with the strategic plan for this measure.
d. Identification of external trends, events, or factors that may impact community health or the health department	d. The identification of external trends, events, or other factors that may impact community health or the health department
e. Assessment of health department strengths and weaknesses	e. The analysis of the department's strengths and weaknesses
f. Link to the health improvement plan and quality improvement plan	f. Linkages with the health improvement plan and details on the health department's roles and responsibilities for implementing the health improvement plan. It must also link with the health department's quality improvement plan. The strategic plan need not link to all elements of the health improvement plan or quality improvement plan, but it must show where linkages are appropriate for effective planning and implementation.

As an Example . . .



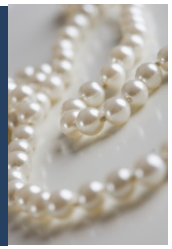
- See page 4 for evidence required for: (a) mission, vision and guiding principles. See page 10 for evidence required for (b) strategic priorities. See pages 12-19 for evidence required for (c) for time-framed targets. See page 27 for evidence required for (d) for external trends. See page 8 for evidence required for (e) for dept.'s strengths and weaknesses. See page 22 for evidence required for (f) linkages with the CHIP."

Show and Tell



- Tell the Site Visit Team where we can find the evidence within the document
- Make sure the description aligns with the PDF page number
- Show us by highlighting – using arrows –text boxes
- Make sure we can open/read the document
- If using links – make sure they are active during review process

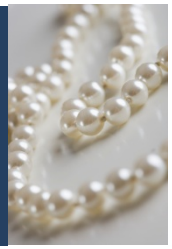
Don't forget about the "optional" narrative



▾ **Health Department's Narrative for Measure 1.1.1 L (Optional)**

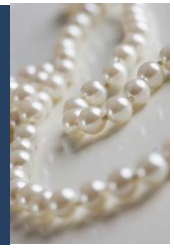
Use the following box to explain how the submitted documentation, taken as a whole, demonstrates and illustrates how the health department meets this measure.

Health Department Narrative



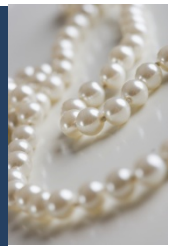
- Helps the Site Visitors understand why you submitted the documentation for the measure
- Information included in the narrative should provide additional details – especially important if you believe the evidence is not especially strong for the measure

Tip #4 – Be Specific and Concise



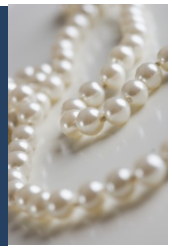
- Select documents that tell your story – not War and Peace
- Documents should be focused and contain clear direction; scanned documents need to be readable
- If submitting an agenda, also include either a sign-in sheet or signed/dated meeting minutes
- Make sure the INTENT of the measure is met
- Be mindful to respond to requests asking for barriers or factors causing problems
- Spell out acronyms and use common language

If You Don't Have It – Say Why



- Site visitors will appreciate your honesty
- A memo from agency leadership explaining why you may not have the documentation, but what your plans are to produce it in the future is beneficial in the review

A Special Mention About Meeting Minutes



Make sure they:

- Are signed and dated
- Contain the names, titles and organizations represented when demonstrating collaborative efforts and/or elective official participation
- Are DETAILED – a simple sentence “plan was reviewed” will usually not suffice to meet the measure

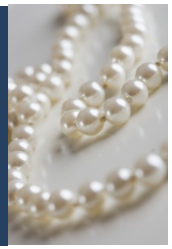
Tip #5 – Review Before Hitting the Submit Button

- If possible, have a “fresh set of eyes” open and review documentation
- Make sure documentation can be opened
- Double check page numbers in description with document
- Check to make sure document matches title
- Look to make sure the document is dated, isn’t in “track-changes” format and it isn’t marked as a “draft”
- Take the time to do a review

Tip #6 – Make It a Team Effort

- During the site visit, the accreditation coordinator can not be in all of the Domain interviews – important for those who are a part of the site visit were also a part of the documentation submission process
- Decide as a team what documentation best represents your efforts – common threads ought to run through the entire organization

Why We Ask Questions and Re-Open Measures



- Need verification or clarification of document submitted – may not be able to locate where in the document you want us to review
- May need an additional example to conform with the intent of the measure
- Prepares site visitors in advance of the on-site visit

Tip #7 – Use Descriptive Titles

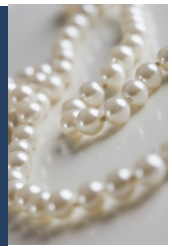
DOCUMENTATION	TITLE	UPLOADED BY
Document 2.1.1 A.1.1	Example 1: Public Health Surveillance and Epidemiological Investigations Plan	[redacted] 07-10-2013
Document 2.1.1 A.1.2	Example 2: Health Department Basic Emergency Operations Plan	[redacted] 07-10-2013
Document 2.1.1 A.1.3	REQUEST FOR ADDITIONAL DOCUMENTATION: On-call training powerpoint	[redacted] 01-29-2014

Tip #8 – Site Visit Is Your Time To Shine!

- Be confident in your team and staff
- Share stories that back up the documentation submitted
- We are on-site to seek clarification/affirmation
- Select community partners who share your passion for public health
- Have access to Internet/Intranet and passwords ready
- Remember – many of the site visitors have also been/are applicants – we know what you are going through!
- Celebrate what you have accomplished!

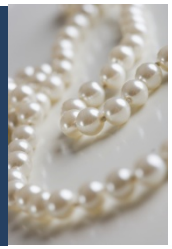
PHAB Resources

www.phaboard.org



- PHAB Guide to National Public Health Department Accreditation Version 1.0
- PHAB Standards and Measures Version 1.0
- PHAB Acronyms and Glossary of Terms version 1.0
- PHAB Fee Schedule (2011-12) Fact Sheet
- PHAB National Public Health Department Accreditation Documentation Guidance Version 1.0
- PHAB National Public Health Department Accreditation Readiness Checklists Version 1.0
- PHAB Standards and Measures Documentation Selection Spreadsheet Version 1.0 (Excel)
- e-PHAB SOI Information
- e-PHAB Application Information
- Video Instructions for Site Visits at www.cecentral.com/phab
- Version 1.0 Errata released 12/22/11

Thank You – Questions?



Contact Information:

Pearls of Wisdom
Consulting
Susan Ramsey
253-606-0956
sramsey_1@comcast.net