

# The Pacific Southwest Addiction Technology Transfer Center Presents: *The Organizational Process Improvement Initiative (OPII)*

- ***Is your agency continuing to experience rapid changes because of the COVID-19 pandemic?***
- ***Are you looking for effective ways of managing blended onsite and virtual teams?***
- ***Are you looking to adopt or implement new practice routines?***
- ***Does your agency need to take your quality and process improvement game to the next level?***

If you answered yes to one or more of these questions, the Pacific Southwest Addiction Technology Transfer Center has a perfect solution – the 2021 Organizational Process Improvement Initiative (OPII). This yearlong intensive technical assistance and organizational coaching program is provided free-of-charge by the team of Pacific Southwest ATTC-affiliated expert faculty.

If selected, your agency will receive the following resources and benefits from the Pacific Southwest ATTC:

- ✓ **Complimentary registration for a team of agency representatives to participate in the virtual Change Facilitator Academy, February 23 – March 25**
- ✓ **Ongoing virtual coaching and technical assistance (including monthly coaching calls) in implementing the five-phased OPII change team process**
- ✓ **Participation in monthly Community of Practice virtual sessions with representatives from other agencies that are part of the 2021 OPII cohort**

To receive provisional acceptance into the OPII, your agency must:

- ✓ **Provide substance use, mental health and/or behavioral health services within the geographic catchment area of the HHS Region 9 Pacific Southwest ATTC (Arizona, California, Hawaii, Nevada, American Samoa, Commonwealth of the Northern Mariana Islands, Federated States of Micronesia, Guam, Republic of the Marshall Islands, and Republic of Palau).**
- ✓ **Identify appropriate individuals to serve as Change Team Facilitators and other members of an OPII Change Team.**
- ✓ **Demonstrate executive leadership sponsorship and commitment to the agency's participation in the yearlong OPII, to include the formation and regular convening of an Agency Change Team, adherence to the phased model of the OPII, and compliance with the Pacific Southwest ATTC minimal reporting and data collection requirements.**



The timeline for the Pacific Southwest ATTC's Organizational Process Improvement initiative (OPII) is found below:

What?	When?	How?
Submit your agency's qualifying application to be considered for the Pacific Southwest ATTC's OPII	October 12, 2020	✓ Find the application and instructions at the end of this document
Notification of provisional acceptance and invitation to complete application	October 19, 2020	✓ Receive email notification with link to additional application materials
Complete program application	November 20, 2020	<ul style="list-style-type: none"> <li>✓ View approximately 90 minutes of online asynchronous instructional modules</li> <li>✓ Develop and submit <b>Agency Change Goal and Objectives</b> document</li> </ul>
Receive formal acceptance into 2021 OPII cohort and invitation to attend Change Facilitator Academy	December 10, 2020	✓ Upon acceptance into the OPII, receive a formal invitation to Change Facilitator Academy and link to mandatory Academy pre-work
Complete Organizational Readiness to Change Assessment (ORCA) Survey of Agency Staff	January 30, 2021	✓ Assess your agency's readiness to change by having staff complete the online Organizational Readiness to Change Assessment (ORCA). You will receive a summary ORCA report at the Academy
Attend the virtual Change Facilitator Academy	February 23-March 25, 2021	✓ Participate in 8 synchronous each ranging from 1 to 3 hours in duration and totaling 21 hours of intensive virtual learning that will equip your staff with a playbook for facilitating your agency's change team
Conduct Change Team Kick Off Meeting at your agency	March 30, 2021	<ul style="list-style-type: none"> <li>✓ Formalize your agency change team and convene a 2-hour <b>Agency Change Team Kick-off Meeting</b></li> <li>✓ Schedule in advance to ensure that Pacific Southwest ATTC staff can virtually attend and assist with kick-off meeting facilitation</li> </ul>
Begin Implementation Activities within your agency	July 1, 2021	<ul style="list-style-type: none"> <li>✓ After completing your <b>Organizational Needs Assessment</b>, finalize your <b>Process Improvement Plan</b> and begin your implementation and improvement activities</li> <li>✓ Hold semi-monthly check in meetings with a Pacific Southwest ATTC organizational coach</li> <li>✓ Participate in monthly 1-hour OPII Community of Practice interactive virtual sessions to reinforce change practices and learn from other participating agencies</li> </ul>
Complete OPII Change Team Initiative Sustainability Report	December 31, 2021	<ul style="list-style-type: none"> <li>✓ Re-survey your staff using the ORCA to evaluate changes in your teams change readiness. You will receive a summary ORCA report within 2 weeks of your survey submission</li> <li>✓ Conduct <b>Agency Change Sustainability Planning Meeting</b> and complete your <b>Sustainability Report and Plan</b></li> <li>✓ Schedule well in advance to ensure that Pacific Southwest ATTC staff can attend and assist with sustainability planning meeting facilitation</li> </ul>

## Change Facilitator Academy Details

In this intensive, multi-day virtual skill-building **Change Facilitator Academy**, participants will learn about organizational change, team facilitation, collaborative software and apps to facilitate virtual teams, and implementation, practice improvement, and process improvement strategies in behavioral health care systems. The virtual Change Facilitator Academy will be presented over a 5-week period of time, with no session longer than 3 hours in duration. The distributed virtual academy schedule uses best practices in online learning and virtual meeting facilitation, while promoting cohort cohesion and engagement between each agency team and the PSATTC faculty. All participants are expected to attend all of the virtual academy sessions. The 2021 virtual Change Facilitator Academy details are as follows:

<b>Week 1</b>	February 23, 24, 25, 2021	3, 3-hour sessions (T-W-TH) , 2-5:15pm PT
<b>Week 2</b>	March 2 & 4, 2021	2, 3- hour sessions (T/TH), 2-5:15pm PT
<b>Week 3</b>	March 11, 2021	1, 2-hour session (TH), 3-5pm PT
<b>Week 4</b>	March 18, 2021	1, 2-hour session (TH), 3-5pm PT
<b>Week 5</b>	March 25, 2021	1, 2-hour session (TH), 3-5pm PT

### Faculty:

- ✓ Michael S. Shafer, PhD
- ✓ Dennis Skinner
- ✓ Beth A. Rutkowski, MPH

### Target Audience:

- ✓ Designed for individuals in middle management positions in substance use, mental health, or behavioral health care agencies and systems who have responsibility and authority to manage practice improvement and/or evidence-based practice implementation initiatives

### Cost:

The Change Facilitator Academy is **FREE** for accepted individuals. Selected participants are responsible for ensuring their access to a fast computer and high speed internet.

### Continuing Education Credit/Contact Hours:

The Academy course meets the qualifications for the provision of twenty-one (21.0) continuing education credits/contact hours (CEs/CEHs).



UCLA Integrated Substance Abuse Programs (ISAP) is approved by the American Psychological Association to sponsor continuing education for psychologists. UCLA ISAP maintains responsibility for this program and its content.

UCLA ISAP is approved by the California Association of Marriage and Family Therapists to sponsor continuing education for LMFTs, LCSWs, LPCCs, and/or LEPs (Provider #64812). UCLA ISAP maintains responsibility for this program/course and its content. Course meets the qualifications for twenty-one (21.0) hours of continuing education credit for LMFTs, LCSWs, LPCCS, and LEPs as required by the California Board of Behavioral Sciences. UCLA ISAP is also an approved provider of continuing education for RADTs I/ II, CADCs-CASs, CADCs I/II, CADCs-CSs, and LAADCs (CCAPP, #2N-00-445-1121), CATCs (ACCBC/ CAADE, #CP40 872 C 0822), and CAODCs (CADTP, #151). Provider approved by the California Board of Registered Nursing, Provider #15455, for 21.0 contact hours. UNR CASAT is an approved provider of continuing education credit for NCACs I/II and MACs through the National Association of Alcoholism and Drug Abuse Counselors (NAADAC, #98165). CE credit will be awarded at the conclusion of the virtual Change Facilitator Academy. Partial credit **will not** be awarded to participants who arrive late or leave early from any given virtual Academy session.

## Faculty:



**Michael S. Shafer, PhD**, is a Professor at Arizona State University's College of Public Service and Community Solutions where he also holds appointments in the School of Social Work and the School of Criminology and Criminal Justice. Dr. Shafer has been associated with the Pacific Southwest ATTC for over 15 years, in addition to serving as Principal Investigator on multiple Federally- and state-funded studies of implementation and inter-organizational collaboration. Shafer's research and praxis of external facilitation and change teams spans a period of 25 years and has involved work with primary health care, mental health, substance abuse treatment outpatient, residential, housing, and case management systems and providers, local school districts, state vocational rehabilitation agencies, police departments, fire departments, prisons, jails, and courts (specialty court and probation departments). Shafer has published extensively in peer-reviewed journals, book chapters, asynchronous learning modules, and curricula. Dr. Shafer mentors graduate students interested in macro-practice social work and provides leadership in the area of public policy practice, program evaluation, and facilitation.



**Beth Rutkowski, MPH**, received her Master of Public Health degree, with an emphasis on epidemiology and quantitative methods, from the University of Medicine and Dentistry of New Jersey, School of Public Health. She has been associated with UCLA's Integrated Substance Abuse Programs (ISAP) since December 2000, and currently serves as the Director of Training and Co-Director of the SAMHSA-supported Pacific Southwest Addiction Technology Training Center. The majority of Ms. Rutkowski's time focuses on the development of synchronous and asynchronous training and technical assistance packages focused on evidence-based substance use disorder treatment interventions and targeted to the community at large. In addition, she organizes and conducts conferences and trainings throughout the Pacific Southwest region (HHS Region 9, covering AZ, CA, HI, NV, and the six U.S. Affiliated Pacific Jurisdictions) on scientifically validated interventions and topics. Ms. Rutkowski is a NIATx-certified process improvement coach, and has directed several statewide, regional, and local process improvement change project initiatives. Ms. Rutkowski has co-authored and edited numerous peer reviewed research articles, book chapters, special issues, and technical reports on treatment evaluation, research-practice partnerships, process improvement strategies for use in substance use disorder and mental health treatment programs, prescription drug misuse, the epidemiology of methamphetamine and crack cocaine abuse, synthetic drugs, process improvement strategies to improve client engagement and retention in treatment, SBIRT, HIV and substance use, medication-assisted treatment, best practices in addiction treatment, and local, national, and international drug trends.



**Dennis Skinner** is the founder and president of MANY-TO-ONE. For over 20 years, Dennis has been designing and facilitating workshops and leadership development experiences in which teams collaborate to develop powerful strategies, solve complex problems, and design innovative products and services together. Dennis marries his energetic facilitation style with deep expertise in design thinking, innovation, process improvement, problem solving, and change leadership to deliver experiences that draw out the best thinking of teams. Dennis received his B.S. in industrial engineering at Arizona State University before spending 24 years at Intel Corporation, where he led organizations and large transformation initiatives throughout the company. In 2000, Dennis founded an internal collaboration capability at Intel called the Accelerated Results Center (ARC), enabling teams to solve complex problems, plan large-scale programs, develop strategic plans, and re-design organizations through immersive facilitated workshops. Comprised of a team of full-time consultants and 5000 square feet of configurable offsite meeting space, the ARC was called out by The Wall Street Journal® as a best practice for effective facilitation of transformative business results. Over the course of his career, Dennis has facilitated hundreds of workshops, focus groups, and keynote talks. He left Intel in 2006 to launch MANY-TO-ONE, following his passion to help people, teams, and organizations fulfill their potential.

**Agency Qualifying Application and Instructions**  
**Pacific Southwest ATTC Organizational Process Improvement Initiative (OPII)**

**Apply now, as space is limited to no more than 15 agencies!** To apply, you can either complete the online form available at [https://uclahs.az1.qualtrics.com/jfe/form/SV\\_0lDjTiozRIL6Bz7](https://uclahs.az1.qualtrics.com/jfe/form/SV_0lDjTiozRIL6Bz7), or complete the fillable application form included below. Please include a copy of the signed letter of commitment from your agency's executive leadership. Applications must be submitted to Shannon Berteau by email ([SBerteau@mednet.ucla.edu](mailto:SBerteau@mednet.ucla.edu)) no later than October 12, 2020.

All completed applications will be reviewed on a rolling basis and agencies will be notified of their provisional acceptance and provided with links to additional application materials the week of October 19, 2020. Please contact Beth Rutkowski ([brutkowski@mednet.ucla.edu](mailto:brutkowski@mednet.ucla.edu)) with program-related questions about the Organizational Process Improvement Initiative or Change Facility Academy.

Logistic questions should be directed to Shannon Berteau ([sberteau@mednet.ucla.edu](mailto:sberteau@mednet.ucla.edu))

<b>Name of Agency:</b>		
<b>Administrative Office Mailing Address:</b>		
<b>City:</b>	<b>State:</b>	<b>Zip Code:</b>
<b>Phone Number:</b>	<b>Fax Number:</b>	
<b>Agency E-mail Address:</b>		
<b>Agency Location Type (select one):</b>  <input type="checkbox"/> Urban <input type="checkbox"/> Suburban <input type="checkbox"/> Rural/Frontier		

**Which of the following best describes your type of agency (select one):**

- Inpatient Behavioral Health Setting
- Residential Behavioral Health Setting
- Outpatient Behavioral Health Services
- Hospital/Hospital Affiliated Clinic
- Peer-Run/Recover Community/Consumer Operated Agency
- State or Local Government Agency
- School/College/University
- Court, Probation
- Prison or Jail
- Police Agency
- Fire/Emergency Medical Services
- Tribal/Indian Health Services
- Community Health Center
- Other (please describe) \_\_\_\_\_

**Total Number of Employees:**

**Total Number of Clients Served Annually:**

**Briefly describe your agency's general goals for participating in the Pacific Southwest ATTC's Organizational Process Improvement Initiative. In other words, what does your agency wish to implement or improve? (50- word limit)**

**Name of Executive Director/Executive Sponsor:**

**Title of Executive Sponsor:**

**Email Address and Phone Number for Executive Sponsor:**

Please provide a listing of up to six proposed Change Team members (this may change upon acceptance into the 2021 OPII cohort).

Possible roles include 1 Executive Sponsor, 1-3 Change Team Facilitators, and 2-4 additional Change Team Members:

First and Last Name	Job Title and Email	Change Team Role (Exec. Sponsor, Facilitator, or Member)

<b>Name of Individual Preparing this Form:</b>	
<b>Email and Phone Number for Individual Preparing this Form:</b>	

**Instructions for Executive Sponsor Letter of Commitment:**

Please include a letter from the Executive Sponsor for this project, named above, demonstrating agreement with the following :

- ✓ Provision of technology access, collaboration software (Miro) purchase, and release time to virtually attend all sessions of the Change Facilitator Academy
- ✓ Modification of job duties of staff named above to include Change Team Facilitation activities
- ✓ Commitment to engage in the yearlong Pacific Southwest ATTC OPII, as described above
- ✓ Commitment to convene and participate in an agency Change Team Kick off Meeting at the conclusion of the Change Facilitator Academy

**Attachment Checklist (please remember to submit, or your qualifying application will be considered incomplete):**

- ✓ Signed Executive Sponsor Letter of Commitment

**Would you like to be added to the Pacific Southwest ATTC listserv to receive information about upcoming trainings?** (If this question is left unanswered, you will automatically be subscribed)

Yes

No

**Instructions for Filing a Grievance Concerning UCLA ISAP’s Continuing Education Program:** Please contact Dr. Thomas E. Freese, CE Program Administrator, in writing (UCLA ISAP, 11075 Santa Monica Boulevard, Suite 200, Los Angeles, CA 90025) or by phone (310-267-5397).



*If you need a disability-related reasonable accommodation/alternative format for this event, please contact us by October 12, 2020.*