



# Improvement Checklist

## PLANNING AND PRIORITIZING

### STEPS TO LINKING WITH YOUR COMMUNITY

Careful preparation and planning will increase the likelihood that you will successfully plan, implement, and monitor a new or enhanced system for linking with your local community.

- Elicit support from leadership to establish better links to the community**  
Discuss the importance and relevance of taking advantage of community agencies and resources with your community. Discuss the role community agencies and organizations can play in providing the highest-quality developmental services to your patients and the role such agencies can play in meeting your patient population's needs.
  
- Determine the needs of your practice population**  
When developing a system for improving coordination with community resources, start by identifying the areas most needed by your practice population. This will provide a focus to your efforts. You can expand the topics and the systems you develop as you identify new needs.
  - What resources do your patients need most frequently or urgently? For example, what proportion of your parents smoke? How many of your parents use car seats properly?
  - Do many of your parents need parenting education?
  
- Identify resources in your community**  
The purpose of assessing what services exist in your community is to understand better how to link with the systems that support and provide services to patients. In some communities, a central agency or organization (e.g., United Way) might have published a resource guide that provides some or all of the information your practice needs to connect to local resources. There also might be an organized group of providers or agencies that has developed mechanisms for sharing information with one another about services. If a coordinated effort is organized, some of the information you might want to seek about this effort includes:
  - Is there a coalition or network of providers working to collaborate and/or coordinate needed services?
  - Are there regular meetings someone from your practice can attend to learn more about services being coordinated? Could you obtain meeting summaries if you cannot send a practice representative?
  - Is there a newsletter, Web site, or listserv you can access to remain informed about the full range of community resources and services?
  - Are there information materials (brochures or pamphlets) about community resources and services for families that your practice can provide to patients?

- What referral systems exist in which your practice could participate? How do they work?
- Is there a community resources guide? How can your practice become listed in it? How can you get copies? How can you get updated versions?

**Establish mechanisms to learn about community agencies and for agencies to learn more about your practice**

- Invite staff from community agencies to your staff meetings on a rotating basis.
- Sponsor a community “mixer.”

**Assign responsibility for coordinating community resources**

Identify someone in your practice to oversee and coordinate your efforts. Consider creating a team of people to undertake this responsibility. Based on the assessment of your practice, collect and organize information about local community resources that target the high-priority areas first.

- Do teams exist or are there individuals within your office who could assist with creating links with the community (e.g., a nurse who coordinates with the local health department)?
- Where and how will contact information about community agencies and groups be organized?
- What space is available for displaying information about community services?
- How often will your information about community services be updated? How can you break this task down into manageable pieces and share the work (e.g., call six agencies per month on a rotating basis)?

**Seek input from families about community resources**

Involving families in your planning about linking with the community will help ensure that your efforts reflect families’ needs and experiences. Parents’ perspectives of community services will provide you with information you will not likely get from the agencies or programs themselves. Understanding the patients’ perspective of using the services will enable you to make more informed referrals.

- Find out what families say about their experience of care. Ask them: What programs or services have you found helpful? What should we tell families whom we refer to this agency or program?

Soliciting input from families can happen in a variety of ways.

- Set up a comments section of your community resources area where patients can submit feedback about different services or agencies with which they are familiar. Create a simple form for families to complete. Post the feedback for others to review.
- Periodically ask five to 10 families who are seen during routine well-child visits about their experiences with community services and what they would recommend that you tell other parents.
- Share findings in a staff meeting or with your practice community coordinator (see below).
- Include questions on parent surveys to elicit information about community programs.
- Organize a parent advisory group for your practice. A possible function of a parent advisory group can be to advise your practice community coordinator.

- ❑ **Communicate with staff about efforts to link with the community**

Seeking ideas and input from staff will help you develop the right system for your office.

  - Ask staff to share their experiences in coordinating with community agencies.
  - Build on existing relationships with community agencies and programs.
  - Inform staff about patient and community information and resources that are available in the office so they can share them with patients.
  - Describe how materials will be organized so that staff can easily access materials and information as needed.
  - Evaluate regularly the costs and benefits of participating in the system.
  - Consider assigning clinicians/staff to see patients at a satellite or community clinic location where other service providers are practicing.
  
- ❑ **Test out ideas before implementing changes throughout the practice**
  - Try a new tool or strategy with five families and review what you learn. For example, after developing or improving a link to one of your prioritized service providers, refer several families to the program and ask yourself, “Did these referrals occur more smoothly than in the past? What were the families’ experiences like? Do I need more information to improve the coordination?”
  - Repeat tests several times before deciding which new materials or strategies to implement. It is important that the team testing new strategies keeps track of its efforts to inform decisions about which strategies and approaches are successful in your practice.
  
- ❑ **Implementing Improvements**
  - Create a list of contacts and eligibility information for staff and patients.
  - Become involved in existing community coalitions or groups.
  - Co-locate community agency staff or other non-medical staff at your practice (this may be most realistic for larger group practices).
  - Provide office space to a social worker or psychologist in exchange for his services and time.
  - Identify or hire an in-house community referral specialist to handle coordination of referrals and to act as a practice-patient community resource. **Encourage Medicaid, the State Children’s Health Insurance Program, or other services enrollment staff to locate in your office part time.**
  - Participate in centrally coordinated community services efforts. Some communities have centralized systems for identification and referral of families who qualify for services. These systems typically use a standard community-wide eligibility screening mechanism to assess and refer families. The public health department or a community-based agency is likely to be coordinating such an effort. To participate, you might need to do the following:

- Find out who is doing “central triage” in the community.
- Determine what is required to participate in the system.
- Evaluate the pros and cons of participating in the system for your practice.
- Participate in training to use the system (staff from the lead agency might be able to provide training to your clinicians and staff).
- Understand criteria and language for referral and enrollment to various services.
- Maintain ongoing relationship with system coordinator.

#### **Train providers and staff**

As you learn more about your community and its resources, you might identify new procedures, forms, and contacts that are needed for you to link effectively with your community. Much of this information might be new to some or all of your clinicians and staff.

- Consider holding informal training sessions for everyone to ask questions about your new approach to linking to the community and to introduce new forms and procedures.
- Include instructions on any new roles or responsibilities for staff or clinicians.
- Convene a session on how to talk about sensitive topics or how to handle difficult situations that might arise as a result of your new strategies (e.g., domestic violence referrals).
- Invite representatives from community agencies to your training sessions or staff meetings.

#### **Identify tools to support improvements in linking to the community**

You might find that creating new links with your community will introduce new forms to your practice. Ideas for incorporating new forms into your practice include:

- Many community agencies will have standard referral forms. Consider if it makes sense for your practice to stock standard referrals forms in your office to make it easier to use them.
- Determine the forms you will use and be sure that everyone understands how to complete them.
- Decide who in your office will complete and process the referral forms. Consider assigning this task to non-clinical staff if possible.
- Identify how to share appropriate forms with community agencies. For example, if an agency has a standard referral form, should you mail it, fax it, or give it to the patient?
- Determine where to store completed copies of referral forms (e.g., in patient charts).

#### **Create a “Community Resources” area in your practice for patients and staff**

Select an area in your office that will be dedicated to information about community programs and resources in your practice. Ideas for creating a community resources area include:

- Bulletin board with information about normal child development and community resources
- Tips for parents to foster healthy child development
- Tips for parents about what to do when a problem is suspected
- Community resources guide

## **MONITORING PROGRESS**

### **Monitor your new system for linking with community resources**

It is important to periodically evaluate your current system for linking patients with needed resources in the community. Some tips for monitoring the quality of this system are found below:

- Seek input from patients and families on a regular basis about their experiences with community agencies.
- Regularly update key contact information (phone number, name, mail, and e-mail addresses) of community agencies and programs for your Community Resources area.
- Regularly update your practice contact information with appropriate community agencies.
- Catalogue the community resources information and make it accessible to staff and patients.
- Stay informed about community issues through periodic contact with key agency staff and public meetings (e.g., by attending local health department meetings, services networks, or coalition meetings or reviewing relevant community publications).

### **Tracking referrals**

One indicator of a quality system of community linkages is the rate of completed referrals to outside agencies. One way of tracking whether families have completed referrals outside the practice is to have a simple tracking sheet of all patient referrals each month. This module provides a sample referral tracking sheet that can be used to follow referrals to community resources. When a quality referral system is in place, you should be able to complete each column within a timely manner (e.g., within a month's time), showing that an effective partnership with your community is established.

### **Referral resources**

- Pamphlets and brochures about child development and community resources
- Display or distribute agency marketing collateral (magnets, business cards, posters)
- Provide simple forms for parent input about community resources and topics of interest
- Telephone parents can use to call other agencies
- Pen, paper, maps, public transit schedules
- Computer terminal with online access