**CalHIVE Behavioral Health Integration (BHI)**

**BHI Sustainability Plan – Section 2: Culture & Engagement**

|  |  |
| --- | --- |
| **Team Name:** |  |
| **Date Updated:** |  |
| **Version:** | Version 1.1, revised 9/3/25 |

* Section 1 due by Tuesday, September 30 to your Improvement Advisor
* Section 2 due by Friday, October 31 to your Improvement Advisor
* Section 3 due by Friday, December 19 to your Improvement Advisor

**About the BHI Sustainability Plan**

* The **Sustainability Plan** is designed to support CalHIVE BHI organizations in planning for the long-term success of their behavioral health integration (BHI) programs—beyond pilot implementation and CalHIVE BHI funding.
* While the **Implementation Plan** focused on launching BHI at a pilot site—establishing workflows, staffing, training, and billing foundations—the Sustainability Plan builds on that work to address what comes next.
* This plan helps teams assess and strengthen:
	+ **Billing and Financing Systems** (Section 1) to support ongoing reimbursement
	+ **Culture and Engagement** (Section 2) to ensure staff and provider engagement in BHI
	+ **Monitoring and Playbook** (Section 3) to ensure BHI can be maintained and expanded
* The Sustainability Plan is structured in sections, aligned with key technical assistance topics (billing, culture, monitoring/playbook), and includes a flexible “menu of improvement actions” for teams to select from based on their context and readiness.
* By completing the Sustainability Plan, organizations will be better equipped to maintain integrated care as part of their standard operations and make the case for continued investment in behavioral health.
* Completion of these 3 Sections of the Sustainability Plan will demonstrate fulfillment with CalHIVE BHI Program Year 3 payment requirements.

**Instructions**

* As part of CalHIVE BHI, each team will complete a **Behavioral Health Integration Sustainability Plan**, which supports long-term planning for sustaining and expanding integrated behavioral health services.
* This plan builds on the foundational work completed in the Implementation Plan and focuses on the next phase: strengthening billing and financing, embedding BHI into organizational culture, and creating infrastructure for monitoring and spread.
* Teams are encouraged to complete the Sustainability Plan collaboratively—during Improvement Advising sessions or in internal meetings—and select relevant improvement actions from each section’s menu to create a tailored workplan.
* Note: The Sustainability Plan will include three sections and an action plan, each of which will be due at different times with different focus areas.
	+ Action Plan steps DO NOT need to be completed by time of submission.

**Sustainability Plan: Section 2: Culture and Engagement**

Objective: Strengthen the BHI program through improved team engagement, provider buy-in and leadership support.

CalHIVE BHI Resources:

* [CalHIVE BHI Website | Learn](https://www.calquality.org/calhive-bhi/#learn)
	+ Section 3 Implementation Plan – Staffing
	+ Section 6 Implementation Plan - Pilot Site Evaluation and Engagement
* January 9, 2023 – Pilot Site Evaluation & Engagement [Slide deck](https://www.calquality.org/wp-content/uploads/2024/01/2024.01.09-CalHIVE-BHI-Commons_final.pdf); [Webinar recording](https://vimeo.com/manage/videos/901294720/060adce04f)
* January 30, 2023 – BeeHIVE: Pilot Site Evaluation & Engagement – Peer Sharing [Slide deck](https://www.calquality.org/wp-content/uploads/2024/01/2024.01.30_CalHIVE-BHI-Webinar_Pilot-Site-Evaluation-and-Engagement.pdf); [Webinar recording](https://vimeo.com/908005271/09e97efc03?share=copy); [AI Summary](https://www.calquality.org/wp-content/uploads/2024/01/1.30.24_BeeHIVE_AI-Meeting-Summary.pdf)
* June 25, 2023 – Pilot Site Evaluation and Engagement Office Hours [Slide deck](https://www.calquality.org/wp-content/uploads/2024/06/2024.06.25_CalHIVE-BHI_Section-6-BEEHive-Webinar.pdf); [Webinar recording](https://vimeo.com/974330768/244db9c807?share=copy)
* June 10 – Adaptive Leadership for [BHI Slide Deck](https://www.calquality.org/wp-content/uploads/2025/06/2025.06.10_CalHIVE-BHI-Commons_Adaptive-Leadership-in-BHI-1.pdf), [Recording](https://vimeo.com/1092278275/0f1b60d186?share=copy)

**Improvement Actions**

*Teams are expected to complete all Core Actions and select at least 2 Improvement Actions from a minimum of 2 different categories*

| **Improvement Area** | **Action #** | **Action** | **Description** | **Recommended For:** |
| --- | --- | --- | --- | --- |
|  |  | **Core Actions** – All required |  |  |
| **Team Engagement** | 1.1 | Include BHI on regular team feedback survey annually to assess BHI engagement and ensure process for making improvements | Ensure survey questions in place (for sites doing BHI); identify survey lead and action steps owner | All sites |
| **Team Engagement** | 1.2 | Include BHI in standard onboarding for all roles | Update relevant documents and trainings to cover BH and BHI program  | All sites |
| **Provider Buy-In** | 1.3 | Support ongoing BHI medical champion | Document medical provider responsibilities for BHI; establish annual review process; identify name and process for re-selection | All sites |
| **Team Engagement**  | 1.4 | Develop BHI Spread Roadmap | Propose and get team and stakeholder feedback on BHI Spread [Roadmap](https://www.calquality.org/wp-content/uploads/2025/09/CalHIVE-BHI-Sustainability-Plan-Section-2_Integration-Roadmap.pdf)  | All sites |
| **Leadership** | 1.5 | Identify content and timing for BHI Sustainability Leadership presentation | Cover [suggested components](#action14) including ROI findings from Sustainability Plan: Sections 1 and 2  | All sites |
|  |  | **Improvement Actions –** Select minimum 2 items from at least 2 different areas |  |  |
|  |  |  |  |  |
| **Team Engagement** | 2.1 | Document responsibilities for BHI champions across other disciplines  | Outline responsibilities in disciplines such as behavioral health, front office | Established sites |
| **Team Engagement** | 2.2 | Include BHI expectations in hiring processes | Including BHI in hiring, including job description and interview; consider adding metrics to annual performance review | Established sites |
| **Team Engagement** | 2.3 | Explore opportunities for educational partnerships  | Connect with local training programs or universities for student interns or BHI trainees | Established sites |
| **Team Engagement** | 2.4 | Optimize workspace for collaboration  | Improve co-location, shared workspaces, signage | Established sites |
| **Team Engagement** | 2.5 | Audit team communication tools  | Review collaboration vehicles (e.g., huddles, chat) and standardize best practices | Established sites |
| **Team Engagement** | 2.6 | Continue BHI staff Education  | Provide brief BHI refresh presentation during team meetings or huddles | Sites looking to spread |
| **Team Engagement** | 2.7 | Connect BHI to employee wellness |  Highlight BHI impact on team satisfaction and/or workplace initiatives (e.g., burnout reduction) | All sites |
| **Team Engagement** | 2.8 | Protect collaboration time | Collaboration time is built into schedules  | All sites |
|  |  |  |  |  |
| **Provider Buy-In** | 3.1 | Gather provider feedback  | Use findings to guide 2026 engagement efforts | All sites |
| **Provider Buy-In** | 3.2 | Include BHI overview and shadowing during physician recruitment and orientation | Include interview with BH, part of tour; consider shadowing for current medical providers | Established sites |
| **Provider Buy-In** | 3.3 | Identify new provider champion  | Include new discipline / new location; correlating with patients served (e.g., pediatrics) | Sites looking to spread |
| **Provider Buy-In** | 3.4 | Offer CEU for BHI sessions | Support accredited BHI educations sessions(s) for PCPs | All sites |
| **Provider Buy-In** | 3.5 | Offer additional training to providers and care teams | Offer training (e.g., REACH, FAST) to provider champions | All sites |
| **Provider Buy-In** | 3.6 | Connect BHI to physician satisfaction and/or wellness  | Map improvements (e.g. reduced time documentation, patient comparison, time studies) to BHI | All sites |
|  |  |  |  |  |
| **Leadership**  | 4.1 | Demonstrate visible leadership support of BHI program | Executive sponsor rounds at integrated clinic and/or attend BH meetings | All sites |
| **Leadership** | 4.2 | Clarify BH leadership role  | Identify org structure and succession planning | Sites looking to spread |
|  |  |  |  |  |
| **Culture** | 5.1 | Support understanding of BHI across organization | Ensure team members can clearly state the purpose of BHI in clinic | All sites |
| **Culture** | 5.2 | Share BHI stories and progress with team; Share BHI Vision statement across organization | BHI Spotlight in Employee communication (e.g. newsletter); identify schedule for ongoing communication | Sites looking to spread |
| **Culture** | 5.3 | Ensure public visibility of BHI program | Update external communication (website, portal) about BHI | Sites looking to spread |
| **Culture**  | 5.4 | Provide BH education and awareness | Run BH related social media campaign (e.g., Depression Awareness) | All sites |
| **Culture** | 5.5 | Create a recognition system for BHI | Support and reward providers or teams who engage in BHI. | Sites looking to spread |
| **Culture** | 5.6 | Identify BHI improvements from staff feedback | Conduct exit interviews or debriefs with BHI staff  | Sites looking to spread |
|  |  |  |  |  |

**Team Selection and Workplan**

Select at least 3 Improvement Actions from at least 2 different Improvement Areas, including ALL core actions.
Complete the table below as part of your plan.

All actions DO NOT need to be completed by submission date.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Action #** | **Selected Action** | **Workplan** | **Planned Completion Date** | **Team Lead** | **Supporting Documentation (add relevant sources)** |
| 1.1 |  |  |  |  |  |
| 1.2 |  |  |  |  |  |
| 1.3 |  |  |  |  |  |
| 1.4 |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Appendix:**

**Action 1.4**

**Outline for Leadership Presentation**

* Alignment with Organizational Strategy – *How BHI supports long-term goals*
* Quality Data – Q*uality measure trends (e.g., Depression Screening; pilot site compared to organization) mapped to BH/BHI program*
* ROI Analysis – *Financial data and supporting analysis (from Sustainability Plan: Section 1)*
* Patient Story – *Story of patient/family/caregiver positive experience*
* Care Team Impact – *Positive feedback from physicians, providers and care team members*
* BHI Roadmap Plan – *Roadmap for BH/BHI sustainability at your organization*
* Research – *Relevant studies supporting BHI*