



**Peer-to-Peer Learning Call Series  
Readiness Assessment Field Guide  
February 7-9, 2022**

**SUMMARY OF INNOVATIONS**

**Topic Area: Readiness Assessment Field Guide**

[The Field Guide for Assessing Readiness to Implement Evidence-Based Cancer Screening Interventions](#) helps public health and health care organizations assess primary care clinics' readiness to implement new and enhance existing evidence-based interventions (EBIs) to increase cancer screening. The guide provides adaptable resources for collecting, evaluating, interpreting, and using assessment data to develop practical implementation plans for use in primary care clinics.

[\[Go directly to the Summary of Innovations.\]](#)

**Peer to Peer Learning Calls**

The Peer-to-Peer (P2P) Learning Program continued its work in offering a learning platform in which NBCCEDP and CRCCP awardees can discuss programmatic innovations and challenges. The focus of the February 2022 P2P calls was on the Readiness Assessment Field Guide, and how awardees in both the CRCCP and NBCCEDP programs have used the guide, planned to use the guide and challenges or barriers they have encountered and how they have dealt with those.

NACDD facilitated a total of four calls. Two one-hour calls were designated for awardees from NBCCEDP and CRCCP programs separately, and two one- and one-half hour calls were structured as "mixed" calls so that both programs could participate on the same calls if desired.

The format of the calls included a brief overview of the Readiness Assessment Field Guide, a "kick-off" presentation by an awardee describing how they have used the Readiness Assessment, break-out sessions for awardees to discuss session questions in smaller groups, and opportunities throughout the session for questions and answers.

**Summary of Innovations**

The questions posed to the participants for the calls were:

1. How are you using the Field Guide? (for NBCCEDP awardees)
2. What is your experience with conducting readiness assessments with your clinic partners? (for CRCCP awardees)

3. How have/will you incorporate the Field Guide into your work with clinics? (for CRCCP awardees)
4. What do you think is the most helpful part of the Field Guide and why? (both programs)
5. Have you had barriers or struggles with Readiness Assessments and how have you dealt with them? (both programs)

There were similar themes, answers, and discussions across the two programs, therefore this summary includes the most salient innovations identified from both programs.

### **Innovations Related to Use of Readiness Assessments and the Field Guide**

#### **Readiness Assessment - Identifying Gaps and Opportunities**

- Conduct a pre-assessment. Use secondary data to assess high-need or disparities in service areas to understand where to start/which clinics to engage.
- Start small and then increase the number of clinics you are working with the following year. Some programs shared that they were too ambitious in terms of the number of clinics they could work with to do an assessment and adapt an EBI.
- Use the Field Guide checklist to crosswalk with an existing assessment to look for gaps or opportunities to improve efforts and/or add questions to your existing assessment tool.

#### **Administering and Collecting Data from the Readiness Assessment**

- Be realistic about how long it will take to do a full clinic assessment. Several programs shared that it takes 4-6 months.
- Put together a wish list of what you would like to measure, and then discuss what is possible in that list with a clinic.
- Break the assessment into manageable sections and administer the assessment in portions over time.
- Put the Readiness Assessment into Qualtrics software.
- Be clear and transparent up front. Communicate clear instructions on how to complete the assessment and how to save answers; be transparent about the time it will take, and which staff need to be involved; and set milestones and due dates for each part of the assessment.
- Ensure that a respondent cannot bypass a question in the assessment.
- Understand the time it takes for program staff to work with clinic partners and cross-train staff on the readiness assessment process so that multiple staff are available to work with clinics.

- Consider contracting with a technical assistance provider (e.g., primary care association or someone with specific clinic experience) to work with individual systems/clinic sites.
- Be prepared to work with each clinic according to their data systems and needs.
- Ask partners what and how they would like the results of the assessment presented to them.
- Hold meetings to present the data collected back to the clinic and drill down in areas where you would like more details or need them to weigh in on changes they could make.
- Set up key informant interviews to do additional fact finding once the assessment is complete or at each stage.
- Think of different ways to administer the assessment: In phases/tiers, by clinic role (e.g., front desk staff versus clinician).

### **Engaging and Re-Energizing Clinic Partners**

- Make using the Field Guide part of their RFA application for new clinics.
- Use the Field Guide (or parts of it/specific tools) with existing partners to re-energize and re-engage them.
- Recognize that partners sometimes do not know about or use different language for what we call “EBI’s”.
- Using a paper and pen readiness assessment is more acceptable to some partners. Other programs are using Word documents with macros built into complete assessments, rather than an online survey tool.
- Prepare an elevator speech to promote the process to clinic partners.
- Articulate the positive aspects of what the partner is already doing to screen patients using EBIs and how this process will help them achieve even greater results.
- Describe how this process can help them streamline their processes overall.
- Be clear this must be a team effort and that the staff need to be onboard with making changes.
- Identify a champion in the clinic to keep tabs on progress, issues and challenges and communicate those to the program.
- Schedule virtual or onsite meetings once a month to discuss progress, data collected, challenges, etc.
- Encourage clinics to use patient navigators and leverage other funds (e.g., Build Back Better funds) and to cross-train staff to spread responsibility for the EBI (e.g., multiple staff can do enrollment) to help sustain use of the EBIs over time.

## **Providing a Systematic and Structured Method for Working with Partners**

- Use the Field Guide checklist and roles/responsibilities matrix tool to discuss and establish roles, responsibilities, and a timeline - all critical elements in a successful partnership.
- Develop a MOA between the program and the partner at the very beginning that identifies shared expectations, roles, and responsibilities.
- Use the Field Guide tools to structure technical assistance calls/meetings with the partner.
- Adapt the Field Guide checklist to what is feasible for the partner.

## **Keeping in Mind Partner Circumstances: Being Flexible and Adapting Approaches**

- Consider partner staffing issues including turnover, reassignments, lack of staff, especially in rural settings.
- Recognize partners continue to deal with COVID impacts for their staff, and patients; it is a competing priority.
- Meet partners where they are: Starting small and allowing plenty of time is sometimes the best approach in our current COVID environment.
- Offer ways to decrease staff time involved for clinics that are struggling: Reduce the number of EBIs the clinic is implementing; and start from what they have/build on existing systems.
- Communicate that the readiness assessment is not a pass/fail assessment; rather, it is coming to a better understanding of clinic flow, and how to make improvements to increase screening.

## **Resource Links**

Field Guide for Assessing Readiness to Implement Evidence-Based Cancer Screening Interventions <https://www.cdc.gov/cancer/crccp/field-guide.htm>

Field Guide - Phase 2. Section 2.3 - different assessment tools for different components that should be assessed (e.g., a tool to assess EHR quality).  
<https://depts.washington.edu/hprc/programs-tools/tools-guides/crccp-field-guide/crccp-field-guide-phase2/#ehr>

Health Systems Improvement Toolkit: A Guide to Cancer Screenings in Indian Country  
[https://www.nihb.org/docs/09232019/NIHB\\_A%20Guide%20To%20Cancer%20Screenings%20in%20Indian%20Country.pdf](https://www.nihb.org/docs/09232019/NIHB_A%20Guide%20To%20Cancer%20Screenings%20in%20Indian%20Country.pdf)