



Elevating Healthcare Excellence: Oak Street Health's Multi-Modal Onboarding Program

Oak Street Health

Best Use of a Blended Learning Program

December 2024



Company Background



Company-at-a-Glance	
Headquarters	30 W. Monroe St., Chicago, IL, 60603
Year Founded	2012
Revenue	
Employees	7,500
Global Scale (Regions that you operate in or provide services to)	Oak Street currently operates more than 200 centers in 25 states: Alabama, Arkansas, Arizona, Colorado, Georgia, Illinois, Indiana, Kentucky, Louisiana, Michigan, Mississippi, Missouri, New Mexico, New York, North Carolina, Ohio, Oklahoma, Pennsylvania, Rhode Island, South Carolina, Tennessee, Texas and Virginia.
Customers/Output, etc. (Key customers and services offered)	Oak Street Health, now part of CVS Health, is a network of primary care centers for older adults on Medicare. Oak Street delivers personalized and preventive care through a model that was created to meet the unique needs of older adults who face chronic illnesses. The integrated model incorporates behavioral



	health care and social determinants support and is easily accessible, with a 24/7 patient support line and home visits.
Industry	Healthcare
Stock Symbol	
Website	www.oakstreethealth.com

Budget and Timeframe

Budget and Timeframe	
Overall budget	\$80,000 cash investment
Number of (HR, Learning, Talent) employees involved with the implementation?	No. of Learning team employees involved with the implementation: 18 No. of other Clinical Operations team employees involved with the implementation: 40
Number of Operations or Subject Matter Expert employees involved with the implementation?	No. of subject matter experts involved: 50+
Number of contractors involved with implementation	One instructional design contractor who assisted with development of a small subset learning materials One third-party, offshore learning development vendor who assisted with development of eLearning content
Timeframe to implement	NOJ: Your Oak Street Health: ~3 months NOJ: Your Team implementation timeframe: ~6 months NOJ: Your Role: varies; precepting implementation timeframe: ~6 months
Start date of the program	NOJ: Your Oak Street Health: October 2022 NOJ: Your Team: March 2023 NOJ: Your Role: <ul style="list-style-type: none"> ● MA Precepting: August 2023 ● WC Precepting: October 2023 ● Nurse Precepting: December 2023



Fit to the Needs

Overview

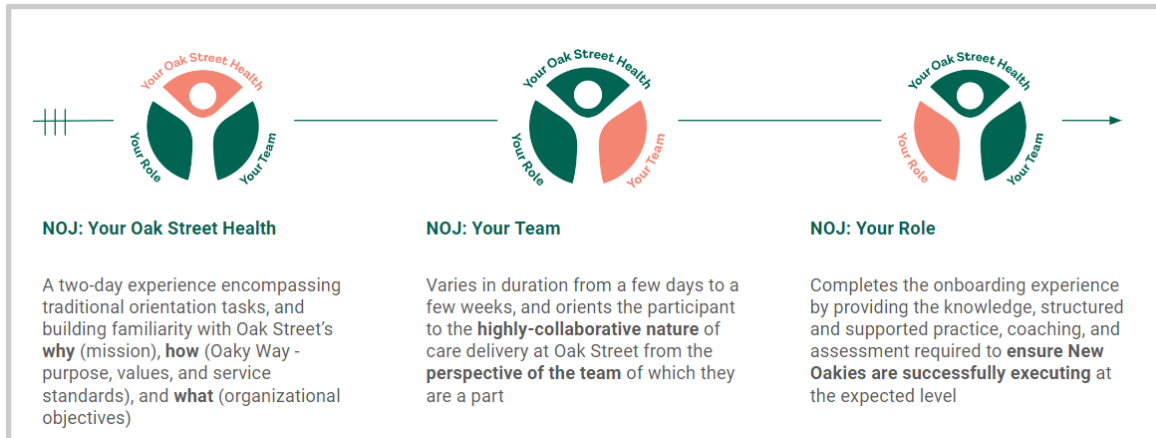
Oak Street created an ambitious, enterprise-wide, multi-modal onboarding program — **spanning 200+ centers across 25 states** — to support retention and the development of critical knowledge and skills required to execute its unique value-based care model of healthcare. Its innovative care model goes beyond typical primary care to provide patients with comprehensive preventive care, including personalized wellness plans, integrated health services, and educational and social activities to support overall health and well-being.

To achieve its mission of “rebuilding healthcare as it should be,” Oak Street focuses on delivering against four perennial organizational objectives:

- **Best Care Anywhere** - Best patient impact and quality outcomes in the country
- **Unmatched Patient Experience** - Patients feel a deep relationship and a memorable experience every time they interact with Oak Street
- **Exceptional Growth** - Expand impact of Oak Street care model to reach more patients and communities
- **Greatest Place to Work & Leader in DE&I** - Empower and enable the best team in healthcare

To support those objectives, Oak Street’s onboarding program strives to **inspire** New Oakies at Oak Street Health and lay a **foundation for their success** at Oak Street — **accelerating proficiency** in role and enabling **authentic connections** with colleagues through an experience that is **consistently** and **efficiently** delivered. This program has helped Oak Street make significant strides in:

- Improving new hire experience
- Reducing turnover
- Improving speed to proficiency
- Creating growth opportunities for high-performing Oakies



The **New Oaky Journey (NOJ)** comprises 24 distinct programs, that are experienced by new hires over three horizons:

- 1) **NOJ: Your OSH** is a two-day experience encompassing traditional orientation tasks, and building familiarity with Oak Street's **why** (mission), **how** (Oakly Way - purpose, values, and service standards), and **what** (organizational objectives). It includes:
 - Virtual ILT sessions: led by central trainers and Oak Street executives
 - eLearning - required learning, and titles foundational to context, such as understanding Medicare basics
 - Local support - from the new hire's manager and local IT and HR experts
- 2) **NOJ: Your Team** programs vary in duration from a few days to a few weeks, and orient the learner to the **highly collaborative nature of care delivery** at Oak Street from the perspective of the team of which they are a part. It includes:
 - Virtual ILT sessions - led by trainers with field experience and expertise
 - eLearning - drilling down into more functional specificity by role
 - Local structured shadowing - prescriptive shadowing schedules with role-specific prompts for reflection, exploring key touchpoints for collaboration between teams
 - Social connections - recommended local social connections and conversations
- 3) **NOJ: Your Role** completes the onboarding experience by providing the knowledge, structured and supported practice, coaching, and assessment required to ensure New Oakies are **successfully executing at the expected level**. It includes:
 - Virtual ILT - where indicated, led by seasoned practitioners



- Precepting program for critical roles via an innovative, structured, blended curriculum (eLearning, shoulder-to-shoulder learning, and assessment) - delivered by a practitioner workforce with earmarked capacity and specific skills training
- Manager support - Centrally defined and communicated role-specific performance markers and 30/60/90-day success metrics assist in facilitation of manager assessment and coaching

As the Learning team created and implemented this program, it conducted structured pilots and closely monitored impact metrics, adjusting the approach and adapting for operational challenges along the way.

Design of the Program

While elements of the **New Oaky Journey** are deployed enterprise-wide, the focus of the efforts have been on Oak Street's critical, center-based teams. This diverse group of Oakies represent a wide range of educational attainment (from M.D.s to high school graduates), work experience, and fluency with technology. Role expectations are quite different from traditional fee-for-service healthcare contexts, and all Oakies collaborate intensely in highly interdisciplinary teams. Many Oakies are directly managed by individuals without expertise in the technical aspects of their role.

The New Oaky Journey adheres to Oak Street's core learning design principles:

- **Action:** Capabilities are built through "learning by doing." Learners practice skills, experience and learn from failure in a safe environment, and apply their new skills in the flow of work.
- **Community:** Practicing, discussing, and teaming with others deepens engagement, surfaces additional perspectives and insights, and fosters a culture of continuous learning through feedback.
- **Ownership:** Learners engage meaningfully when they feel a commitment to achieving outcomes; an experience drives this by intentionally accessing their needs and fostering their engagement, leading them to greater self-awareness and shifts in their ways of approaching the world.
- **Reinforcement:** Multiple iterations of realistic practice, with increasing difficulty and appropriate scaffolding and feedback, effect lasting capability building. This is fueled by reflection on success and difficulties, enabling participants to reinforce adaptive connections and rethink less optimal ones.
- **Narrative:** Emotional, sensory, and inclusive story-driven experiences capture attention, help learners create and share meaning, and promote retention.



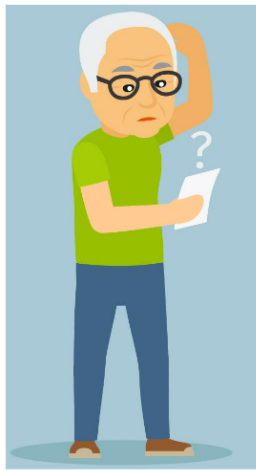
These principles are expressed through the selection of modalities across the program:

Modality	Used when	Design prioritizes
eLearning	Selected when there is a need to baseline a large cohort on knowledge and/or a need to ensure a high degree of consistency in content. Often leveraged as pre-work for application-focused in-person sessions.	Includes scenario- and problem-focused learning that engages the learner in uncovering principles, rather than passively receiving information. System simulations also encourage low-stakes practice before application in live tools. eLearnings include assessments to help learners assess their own mastery.
Instructor-Led Sessions (group, virtual or in-person)	Chosen when topics benefit from group discussion, role-play, and on-the-spot coaching that enables personalized reflection. Serve as a vehicle for building a sense of cohort and community for New Oakies.	The majority of learner time is spent in large or small group discussion, paired work, or hands-on system training. Sessions are led by facilitators who have explicit training in facilitating effective learning experiences (as well as subject matter expertise).
Shadowing	A critical strategy to use to help New Oakies understand physical processes in-center, begin to learn relevant workflows, and to make connections with their immediate colleagues.	Shadowing experiences are not passive, but observers seek answers to specific, pertinent questions through their shadowing experiences. They review their observations and check the completeness of their understanding with their line manager.
Shoulder-to-shoulder learning (“precepting”)	Chosen to build critical skills in marrying complex workflows, patient interactions, care delivery, and use of proprietary systems. Preceptors are responsible for assessing learner mastery of key role-specific skills.	Precepting is supported by a highly-structured curriculum, including eLearning and clear expectations for shoulder-to-shoulder sessions. Sessions begin with explanation and observation of experts, and proceed through multiple iterations of practice with decreasing scaffolding.
Manager support	Embedded to ensure accountability for the successful execution of training	Centrally-provided operational guidance to arrange local elements of training experience. Clear



Modality	Used when	Design prioritizes
	and the development of essential knowledge and skills.	assessment criteria for 30 / 60 / 90 day checkpoints for high-volume roles.

Traditional “fee-for-service” care creates challenges for patients like Mr. Lu



Providers spend too little time with patients

Leaving them challenged to build relationships and control chronic conditions. Only 55% of recommended preventative services are delivered.



Limited care coordination between visits

A fragmented and disorganized infrastructure relies on Mr. Lu to navigate a confusing sea of recommendations and action items.




Poor access to additional services

Mr. Lu’s primary care does not reliably facilitate access to additional services—such as home-based care, medication management, or behavioral health—that are critical to keeping him well.

NOJ: Your OSH uses storytelling and patient examples to bring Oak Street’s “why” to life.



Mapping Our Collaboration



In groups, review three patient scenarios and work together to describe how OSH would collaborate to deliver for the patient.

Look particularly for the role of:

- The service team daily huddle
- The center SOP
- Responsiveness guidelines
- CC Service team
- Canopy Inbox

Be prepared to share your responses & your questions when we return!

NOJ: Your Team puts participants to work – building community and working to understand Oak Street’s highly collaborative care model by:

- Creating more **relevant, practical understanding** of key touchpoints, workflows, and systems across the **care and service teams**
- Bringing learnings to life by incorporating more **targeted shadowing and reflection**
- Increasing **meaningful interactivity** of sessions and enabling **consistent delivery** via central trainer team
- **Preparing** New Oakies for **NOJ: Your Role** and **more role-specificity and shoulder-to-shoulder learning** in the center, and ensuring they can **access the resources and support they need**, when they need it



Anatomy of a Precepting Session

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Preceptor	Assign activity to be precepted	Confirm eLearning reviewed Reinforce why & any overview needed Answer questions	Demonstrate task Ask learner to explain in own words what they observed	Ask learner to perform task, with guidance Praise success & correct errors	Observe learner performing task Assess mastery and share feedback when needed	Reflect on session together and share observations of strengths, challenges, and areas to focus
Learner	Review 5-15 min. eLearning	Review 5-15 min. eLearning	Observe Ask clarifying questions	Perform task Ensure understanding of corrections	Practice task across a variety of contexts Ask questions, assess own confidence	Reflect on session together and share thoughts on strengths, challenges, areas to focus

NOJ: Your Role puts the learner in the driver’s seat—demonstrating capabilities through repeated practice with decreasing scaffolding.

Let’s look at how the QuantaFlo POCT process unfolds.



81-year-old Mr. Quang Nguyen has a Progress Visit with Dr. Bondie scheduled. Sheila, Dr. Bondie’s MA, will handle his rooming today. Mr. Nguyen requires verbal screenings, multiple lab tests, QuantaFlo, and RetinaVue POCTs. In the morning huddle, Sheila notifies Dr. Bondie that 20 minutes is inadequate to conduct the vitals, screenings, and tests. Dr. Bondie advises her to schedule an additional visit if all the tests cannot be completed.

NOJ: Your Role utilizes best-in-class media-rich, scenario-driven eLearning to drive learning outcomes at scale.

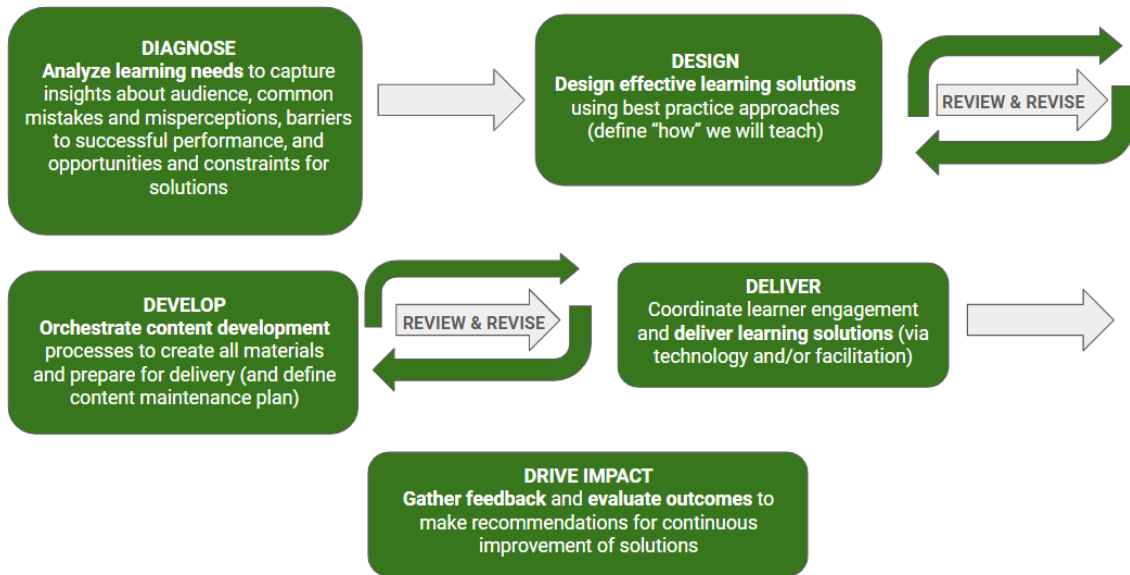


Oak Street Learning employs a “5 Ds” (Diagnose, Design, Develop, Deliver, Drive impact) instructional design model: a simple adaptation of Dick and Carey’s well-known "ADDIE" (Assess, Design, Develop, Implement, Evaluate) model:

The following table outlines, at a high level, what happens during each phase and the Learning team’s and the “client’s” accountabilities to the process:

Development Phase	Business: accountabilities	Key	Learning: Key accountabilities
Diagnose: Align on what we want to accomplish	Articulate strategic and cultural priorities Prioritize learning needs across cohorts (assess criticality & gap of current performance)		Analyze learning needs to capture insights about audience, common mistakes and misperceptions, barriers to successful performance, and opportunities and constraints for solutions
Design: Create a detailed plan for the solution	Allocate resources to support learning solution development (e.g., budget (if necessary), subject matter experts)		Design effective learning solutions using best practice approaches (define “how” we will teach)
Develop: Develop all materials	Provide subject matter expertise (articulate the “what” to teach)		Orchestrate content development processes to create all materials and prepare for delivery (and define content maintenance plan)
Deliver: Prepare facilitators & engage participants	Provide support and sponsorship to encourage adoption of learning solutions and lead by example		Coordinate learner engagement and deliver learning solutions (via technology and/or facilitation)
Drive impact: Get feedback and continuously improve	Conduct performance evaluation to evaluate impact on individual or team performance		Gather feedback and evaluate outcomes to make recommendations for continuous improvement of solutions

By applying some of the best practices learned from the widely successful Agile/Scrum adaptive software development framework to Oak Street Learning’s proven 5Ds instructional design model, Oak Street Learning utilized a hybrid, iterative design and development approach for **NOJ: Your Oak Street Health** and **NOJ: Your Team**:



The approach promoted a frequent “review and revise” philosophy in which **design/development happened in multiple iterations (two-week sprints)** -- based on close collaboration and feedback from stakeholders. Similar to Scrum, the model:

- Provided more transparency in the design and development process;
- Enabled the instructional design team to expose any risks or potential misalignment with organizational requirements; and
- Ultimately improved project outcomes by delivering value at consistent intervals and adapting, as needed

Developing virtual session content using two week sprints

Day 0 / sprint prep

Reach out for source materials, from Population Health & Position Leader teams
 Identify and engage SMEs (via Paula, Caroline, etc.), including booking review sessions

Day 1	Day 2	Day 3	Day 4	Day 5
Create detailed agenda for session	Core team & trainers provide feedback on detailed agenda	Revise detailed agenda SME review meeting & additional content recommendations	Finalize detailed agenda First draft presentation content	First draft presentation content
Core team & trainers provide feedback on presentation content First draft facilitator notes & participant guide	Revise presentation content	SME review meeting User group review meeting / pilot delivery	Finalize presentation content, facilitator notes, participant guide	Complete v1 of developed content



A hallmark of **NOJ: Your Role** is the opportunity for learners to engage in shoulder-to-shoulder shadowing, skills assessment, and remediation training with a preceptor who provides supervision during clinical practice; an essential and proven component of role preparation and ongoing performance management in healthcare settings. For **NOJ: Your Role**, a precepting curriculum was designed and developed for three critical center roles: Medical Assistants, Welcome Coordinators, and Nurses.

A preceptor:

- **Helps new and established Oakies at existing centers** put into practice what they have learned in onboarding
- **Assesses** readiness to perform tasks and skills independently
- **Supports** remediation or building new skills for established Oakies

In conjunction with the centrally-delivered classroom learning during Week 1, precepting training (starting in Week 2) **helps to simplify and standardize operations** and **boost engagement and retention** for Oakies and preceptors alike.

Design of **NOJ: Your Role** “precepting” required the Oak Street Learning team to develop for each role:

For the overall model:

- **Preceptor role overview:** Overview of selection criteria, expectations, time commitment, etc. shared with preceptor & their manager
- **Preceptor manual-standard elements:** Explain precepting model, share best practices
- **Feedback surveys:** For preceptor and learner

For a given curriculum (role):

- **Preceptor manual-curriculum overview:** Guidance explaining overall curriculum for role, expected order and time investment
- **Preceptor training session deck:** To build key coaching and feedback skills
- **Communication templates:** For preceptor to learner and/or the learner’s manager

For each activity precepted:

- **Preceptor manual-module content:** Supports precepting on one specific activity, including assessment guidelines/rubric



- **eLearning:** On-demand, foundational resource for learner

Delivery of the Program

NOJ: Your Oak Street Health is a two-day program (delivered on Days 1 and 2 of every New Oaky's onboarding journey) consisting of:

- Oak Street Learning team-delivered virtual ILT
- eLearning
- Local support from manager, IT, HR

NOJ: Your Team is a multi-day program consisting of:

- Oak Street Learning team-delivered virtual ILT
- eLearning
- Local, structured shadowing
- On-the-job activities

NOJ: Your Role includes:

- Virtual ILT led by seasoned practitioners
- Precepting program for critical roles via an structured, blended curriculum (eLearning, shoulder-to-shoulder learning, and assessment): Delivered by a practitioner workforce with earmarked capacity and specific skills training
- Manager support: Centrally defined and communicated role-specific performance markers and 30/60/90 day success metrics assist in facilitation of manager assessment and coaching

Change Management Efforts

PMO Implementation

New Oaky Journey implementation at scale required close collaboration with Oak Street's "PMO" (project governance team), who reviewed and ultimately approved the full-scale, multi-faceted implementation plan, including:

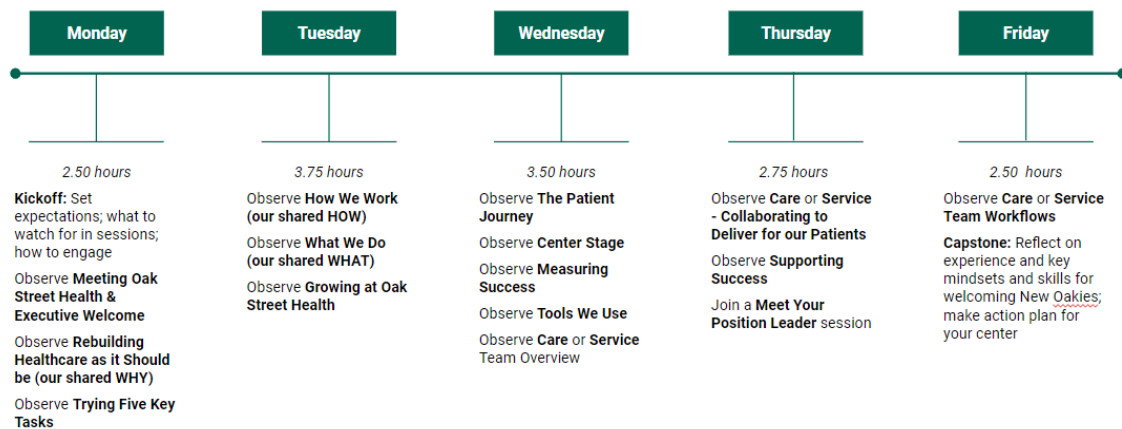
- Description of the change:
 - Overview
 - Roles impacted
 - Patient experience impact
 - Potential risks
- Implementation plan:
 - Implementation pilot plan



- Stakeholder feedback
- Training & post-training communication and follow-up plan
- Implementation guidelines & resources

“Manager Immersion” Training

As part of the effort to bring managers along on the reimagined **NOJ: Your Team** experience, Oak Street Learning designed a “Manager Immersion” training experience for managers of New Oakies – a 15-hour experience that includes two manager-only sessions to drive insights and actions and the opportunity to “ride along” with a cohort of New Oakies, observing their experience and enriching the sessions by providing additional stories and examples that bring the organization’s work to life:



Manager Immersion session learning objectives:

- Explain to their team WHY they are investing time to attend **NOJ: Your Team**
- Attend **NOJ: Your Team** session with the mindset & awareness of how to be an active observer
- Use the **NOJ: Your Team** Manager Immersion Participant Guide to document questions, feedback, and ideas that will be debriefed with the Learning team
- Plan and coordinate with other clinic leaders and their team to account for being devoted to participating the week of **NOJ: Your Team**
- Prepare to reinforce key themes from **NOJ: Your Team** with your local team that you lead and support

By immersing in the updated **New Oakie Journey**, managers:



- Drove speed to proficiency and new-hire retention by experiencing onboarding from the perspective of a New Oaky
- Updated their perspective on the WHY, HOW, and WHAT of Oak Street
- Were refreshed on how a center’s people, processes, and tools contribute to driving outcomes, experience, and growth for Oak Street—and key touchpoints and workflows for each role

Measurable Benefits

Oak Street implemented elements of the New Oaky Journey from October 2022 through the end of 2023, while onboarding 5,981 new Oakies in 2023. There has been measurable improvement against all of the objectives of the program at scale (200+ centers across 25 markets):

(1) Improved learner sentiment around new hire experience:

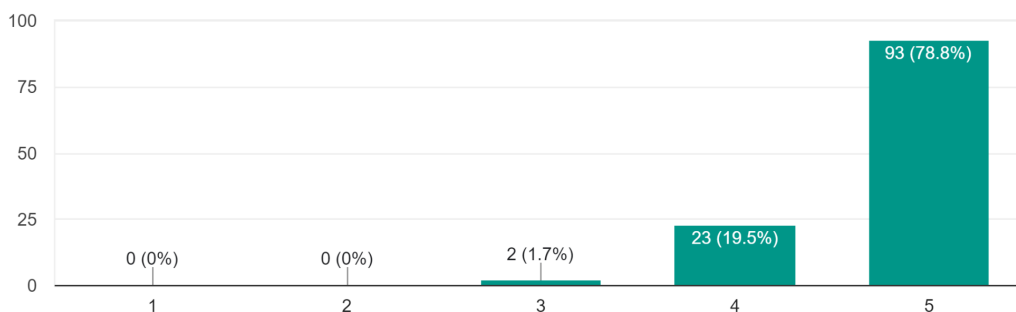
Oak Street deploys an engagement survey to new hires at their 7-, 30-, and 100-day marks. At each timepoint, Oak Street has seen improvement in this overall index from pre-program to most recently available data:

- 7-day from **82** (9/22) to **88** (11/23)
- 30-day from **81** (9/22) to **84** (11/23)
- 100-day from **75** (9/22) to **79** (11/23)

118 of the first 150 New Oakies who participated in the newly launched **NOJ: Your Oak Street Health** completed surveys aimed at measuring learner sentiment around the new experience:

Overall I understand our organizational priorities

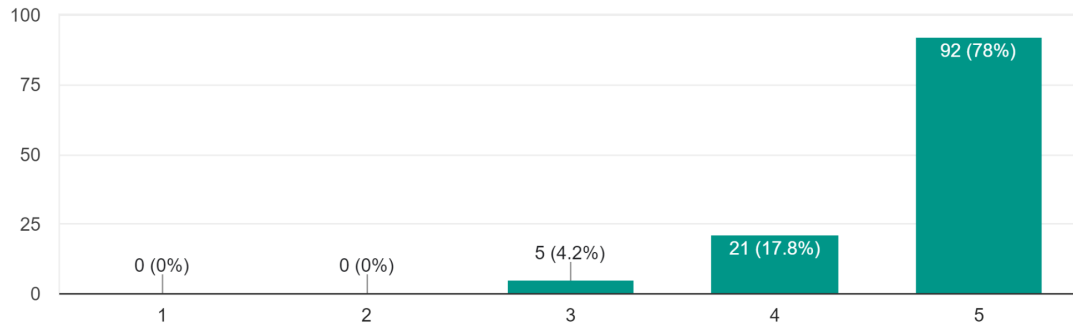
118 responses





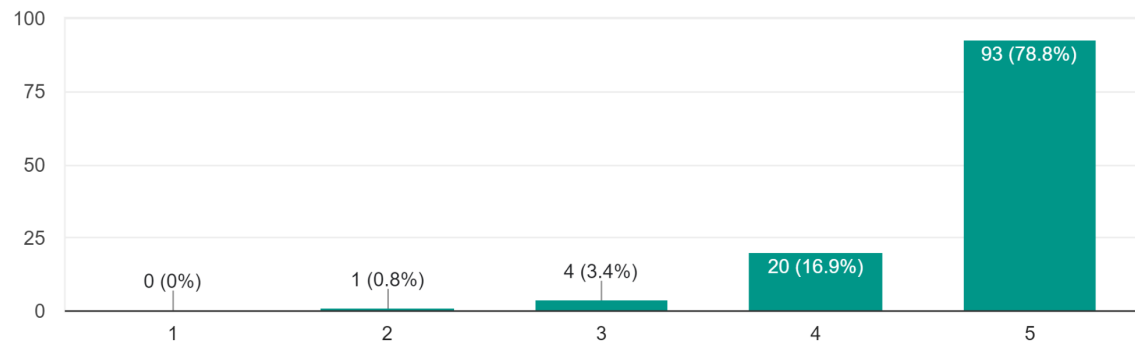
I feel inspired about my decision to join OSH

118 responses



Overall I understand how my work will contribute to the OSH mission

118 responses



Over time, these survey results have remained consistent. Following are direct quotes received from **NOJ: Your Oak Street Health** learners:

“Coming from a space of having worked in health care for 20+ years, and having poured my happy social worker heart into others in a hospice setting, I believed that I had nothing left to offer healthcare (as it was and prior to finding this opportunity)! I'm FINALLY inspired to be ME again, fully and with the meaningful support of a team of people who GET IT. We are all humans doing the work of being and I love that the team here represents a mindful and meaningful opportunity to [be] the change that healthcare desperately needs.” -2/19/23



“This has been the best experience in an orientation I have ever had. I am proud to be an OAKIE!!!!” - 3/18/23

“The videos, the true stories from the facilitators, and the exercises they had us complete. It gave me time to be reflective, and to get excited that I am truly going to be making a difference in the world.” -2/19/23

“These sessions were amazing. The passion, energy, motivation, and love I felt coming from these beautiful people doing these trainings really felt like an experience. I have never felt so welcomed and safe in a work environment. This is AWESOME!! Proud to be a fellow Oakie!” -2/19/23

(2) Reduced turnover:

- Oak Street saw an **overall year-on-year decrease** in turnover of **17% in 2023**.
- During the initial quarter of rolling out the **NOJ: Your Role - Medical Assistants (“precepting”) program**, MAs not trained by a preceptor had **1.7X** higher turnover in their first three months than MAs that were trained by a preceptor.

(3) Improved early proficiency: This dimension is best assessed at a role-specific level. Oak Street is just beginning to see the impact of its “precepting” programs, as they launched in Q3 and Q4 of 2023. There are early indications that these **NOJ: Your Role** programs are having a positive impact:

- For **Medical Assistants:**
 - MAs not trained by a preceptor had **1.8X** higher rating of “below expectations” at 90 days than MAs that were trained by a preceptor
 - Survey of first cohort of MA “preceptees:”
 - 96% reported “Working with my preceptor was an effective way to learn the core workflows of my role.”
 - 91% reported “I was able to work independently within my first 30 days at Oak Street because of my MA Preceptor.”
 - 60% of managers reported “Compared to other new MAs who did not receive precepting, this MA performed better, this MA built skills more quickly, and



this MA demonstrated more confidence”

- For **Welcome Coordinators**, from survey of first cohort of WC preceptees:
 - 93% reported “Working with my preceptor was an effective way to learn the core workflows of my role.”
 - 86% reported “I was able to work independently within my first 30 days at Oak Street because of my Lead WC or Center Operations Supervisor [roles conducting precepting].” (survey of first cohort of WC “preceptees”)

(4) Creation of growth opportunities for high-performing Oakies: As Oak Street brings more rigor to training new hires, it is creating opportunities for career growth. For instance, in developing the Medical Assistant Precepting program, Oak Street defined two new organizational roles (an MA II role and an MA Preceptor role), executed an org-wide selection process, and built new skills in a cohort of preceptors. There is evidence these changes are improving employee sentiment. The Medical Assistant cohort overall, saw a five percentage point increase from spring ‘23 to fall ‘23 on the engagement survey question, “I have meaningful career development opportunities at Oak Street Health.” These changes have also resulted in meaningful career growth for the leaders of preceptors.

Overall

The investments Oak Street has made in a comprehensive, blended onboarding journey have paid real dividends for the organization. Reflections from the design and development of the New Oaky Journey that will inform future efforts include:

- **Learning is a journey.** The onboarding of New Oakies is not a discrete event happening during their first few days. To make real progress on talent metrics, it’s essential to take a longer-term, role-specific view; and to identify the right interventions for the right learning needs.
- **Learning is a team sport.** In the service of a connected experience, it’s impossible to overstate the importance of partnership across the organization. Creating an inspiring experience requires deep collaboration between learning, IT, talent, and dedicated local leaders and team members.
- **Learning builds culture.** From their first day at Oak Street, new hires are connected to, and inspired by, the mission, purpose, value, and objectives of Oak Street. New hires are moved by the stories and first-hand examples



- shared by central trainers, supporting executives and experts, and their local teams. Establishing these connections early provides essential motivation and support throughout the training experience.
- **Learning enables change.** In the development of Learning programs, the team frequently grapples with variability in operating procedures and standards across the organization's geography. Developing programs together enables alignment on a common way of working to teach. This operational stability is what, in turn, enables the nimble change the organization requires to be successful.

Oak Street Health will carry these learnings forward as it continues to invest in the professional development of the best team in healthcare to pursue its mission of “rebuilding healthcare as it should be.”



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