

Promising Practices Supporting the Sustainability of Patient Navigation: An Implementation Guide



**October 22, 2025
Webinar**

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Promising Practices Supporting the Sustainability of Patient Navigation: An Implementation Guide



Promising Practices Supporting the Sustainability of Patient Navigation: an Implementation Guide



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Disclosures

Andrea Dwyer, MPH: No Disclosures

Bonny Morris, PhD, MSPH, RN: No Disclosures

Thank you!

The American Cancer Society National Navigation Roundtable (ACS NNRT) and the American Cancer Society Leadership in Oncology Navigation (ACS LION™) would like to thank the many contributors to this guide, especially the [ACS NNRT 2024 Steering Committee](#) and [Task Group Chairs](#), the ACS Navigation Capacity-Building Initiative grantees, and the ACS Medical Content team.

The development of the guide was informed by the [Patient Navigation Sustainability Assessment Tool \(PNSAT\)](#). This tool was developed by the Colorado Cancer Screening Program (CCSP) and adapted from the [Program Sustainability Assessment Tool](#) and [Clinical Sustainability Assessment Tool](#), which was developed by the Center for Public Health Systems Science (CPHSS) at Washington University in St Louis.

The ACS NNRT would like to give special thanks to Sanofi for their generous donation that funded the development of this guide.

ACS LION would like to recognize the sponsors whose contributions made the creation of the ACS Navigation Capacity-Building Initiative Grants possible: AstraZeneca, Johnson & Johnson, GSK, Genentech, Bristol Myers Squibb, Sanofi, Daiichi Sankyo, Novocure, and Pfizer.

Session Goals

- Discuss Why Sustainability is Important
- Discuss the Constructs of Sustainability and the Domains of the Patient Navigation Sustainability and Assessment Tool (PNSAT)
- Introduce the new Navigation Sustainability Implementation Guide developed by NCCRT and LION
- Leverage the Guide to put sustainability domains into practice
- Introduce Upcoming Learning Collaborative and Existing Resources

Why sustainability tools are necessary

- Sustainability planning tools can be used to support the integration of programs and interventions with other clinical practices.
- Important for programs and practices to consider how to build capacity and make the business case for evidence-based approaches to be sustained
- Washington University definition of clinical sustainability: The ability of an organization to maintain structured clinical care practices over time and to evolve and adapt these practices in response to new information
- Dedicated support to participating programs in efforts to sustain patient navigation practices within their setting and exploring strengths and opportunities for improvement

Why is planning for sustainability important to you?

Adapting the Wash U Sustainability Domains

Wash U PSAT

PSAT Domains	Definition
Environmental Support	Supportive internal and external climate for the program
Funding Stability	Establishing consistent financial base for program
Partnerships	Cultivating connections between program and stakeholders
Organizational Capacity	Internal support and resources to effectively manage program
Program Evaluation	Assessing program to inform planning and document results
Program Adaptation	Adapting program to ensure ongoing effectiveness
Communication	Strategic communication with stakeholders and public about program
Strategic Planning	Using processes to guide program's directions, goals, strategies

Wash U CSAT (Pilot version)

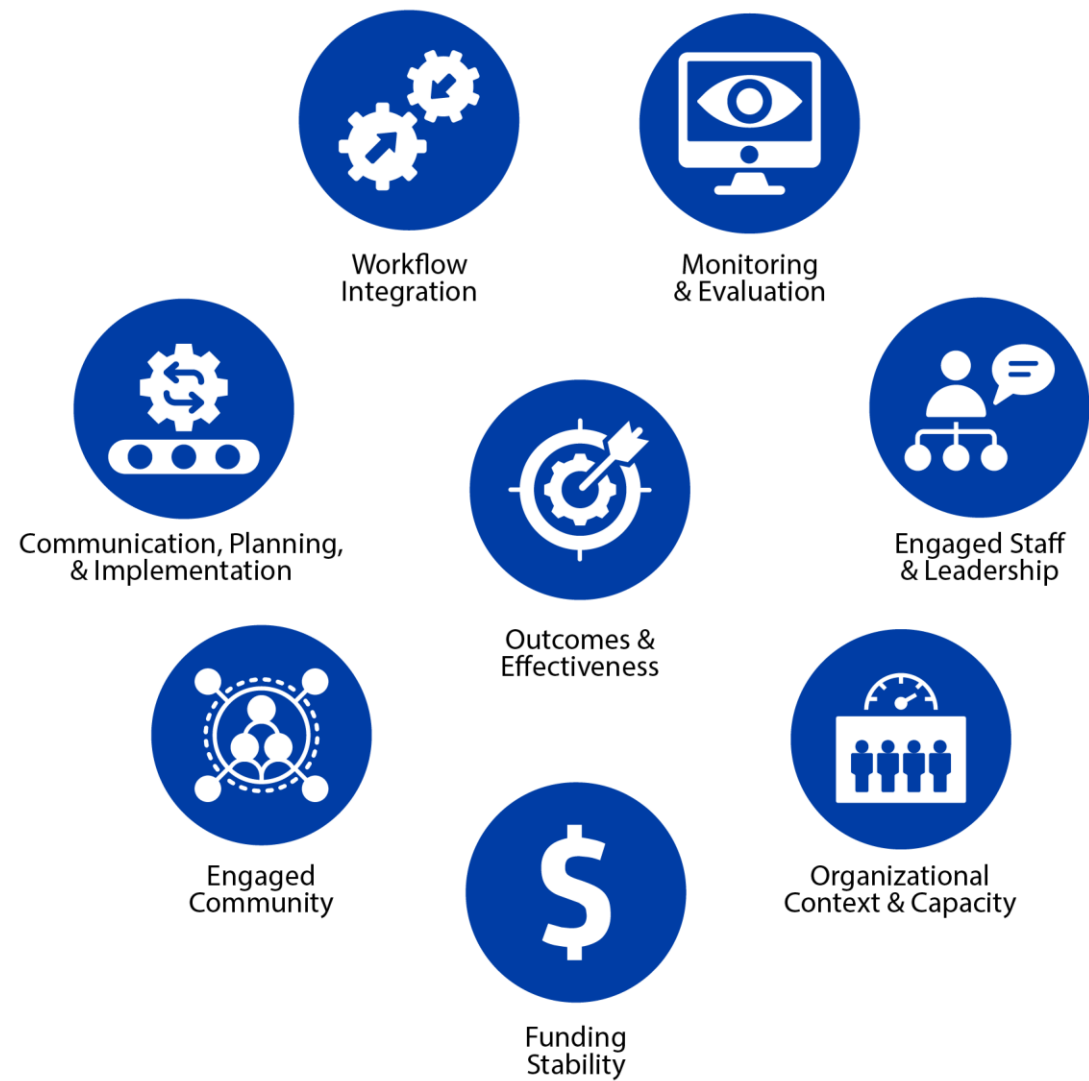
CSAT Domains	Definition
Engaged Staff & Leadership	Having supportive frontline staff & management within the organization
Engaged Stakeholders	Having external support and engagement for the practice
Monitoring & Evaluation	Assessing the practice to inform planning & document results
Planning & Implementation	Using processes that guide the direction, goals & strategies of the practice
Outcomes & Effectiveness	Understanding & measuring practice outcomes and impact
Workflow Integration	Designing the practice to fit into existing practices & technologies
Organizational Context & Capacity	Having the internal support and resources needed to effectively manage the practice

CCSP PNSAT

PNSAT Domains	Definition
Engaged Staff & Leadership	Having frontline staff & management within the organization who are supportive of the PN practice
Organizational Context & Capacity	The PN practice has the internal support & resources needed to effectively navigate patients/clients
Funding Stability	The PN practice has established a consistent financial base
Engaged Community	The PN practice has external support & engagement (beyond the clinical navigation team)
Communication, Planning, & Implementation	Using processes that guide the direction, goals, & strategies of the PN practice
Workflow Integration	Designing the PN practice to fit into existing processes, policies, & technologies
Monitoring & Evaluation	Assessing the PN practice to inform planning & document results
Outcomes & Effectiveness	Understanding & measuring practice outcomes and impact of the practice

Patient Navigation Sustainability Assessment Tool

PNSAT



PNSAT Domains	Definition
Engaged Staff & Leadership	Having frontline staff & management within the organization who are supportive of the PN practice
Organizational Context & Capacity	The PN practice has the internal support & resources needed to effectively navigate patients/clients
Funding Stability	The PN practice has established a consistent financial base
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Communication, Planning, & Implementation	Using processes that guide the direction, goals, & strategies of the PN practice
Workflow Integration	Designing the PN practice to fit into existing processes, policies, & technologies
Monitoring & Evaluation	Assessing the PN practice to inform planning & document results
Outcomes & Effectiveness	Understanding & measuring practice outcomes and impact of the practice

Poll



Which 1-2 PNSAT domains would you be most interested in focusing on for sustainability capacity building efforts? (select up to 2)

- Engaged Staff & Leadership
- Organizational Context & Capacity
- Funding Stability
- Engaged Community
- Communication, Planning & Implementation
- Workflow Integration
- Monitoring & Evaluation
- Outcomes & Effectiveness

Purpose of the Sustainability Guide

Provide a practical resource for sustaining and institutionalizing patient navigation, whether you are seeking to develop, expand, or maintain a program.

Assist organizations in identifying opportunities to improve the sustainability of their navigation programs.

Structure of Guide

Domain description and importance

Sustainability Elements

Best Practices

Potential action steps

Case studies



PNSAT Domain - Communication, Planning, & Implementation:
Using processes that guide the direction, goals, and strategies of the patient navigation program

Why does Communication, Planning, & Implementation matter?

Communicating externally about your patient navigation program's effectiveness helps it gain greater visibility and builds support from partners and the public. Internally, evidence that a program works builds staff buy-in and support from organizational leaders. The more people know and care about your program and mission, the more likely they are to support your efforts to continue providing services.



Sustainability Elements

- The patient navigation program clearly outlines roles and responsibilities for all staff.
- The program is clearly communicated to and understood by all staff.
- Staff receive ongoing coaching, feedback, and training for the program.
- Patient navigation program implementation is guided by feedback from external partners and patients.



Best Practices

- Define patient navigation as a standard of care supporting organizational KPIs to recognize the value it brings to the organization and patients served. Actively communicate about patient navigation through a variety of channels to share meaningful contributions.
- Standardize onboarding, invest in staff development, and focus on job satisfaction to reduce turnover and burnout.
- Engage leadership in celebrating patient navigation successes and contributions to organizational goals through various communication channels.



Potential Action Steps

- Align job descriptions and professional titles with the Oncology Navigation Standards of Professional Practice. Ensure ongoing professional development for staff.
- Develop communication documents to promote the patient navigation program across various audiences.
- Develop infographics that highlight the intersection between the cancer continuum for a patient experience and patient navigation services.
- Elevate community feedback received through patient advisory councils, and incorporate into staff meetings and training.
- Leverage community networks to educate about the role of patient navigation.



Case Studies

- [Peak Vista Community Health Center, Colorado Cancer Screening Program](#)
- [Virginia Commonwealth University, Massey Comprehensive Cancer Center](#)



Case Studies

Primary PNSAT domains addressed
Project description and goals
Tools developed or utilized
Process
Results

Case Study

Huntsman Cancer Institute

Organization

Huntsman Cancer Institute (HCI) is the only NCI-designated comprehensive cancer center in the Mountain West. It is on the University of Utah campus in Salt Lake City. In 2021, HCI committed to serving Utah, Wyoming, Nevada, Idaho, and Montana residents.

Contributors

- Donna Branson
- Jeff Yancey, PhD
- Liliana Mulato
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- Bea Lingwall

Primary PNSAT Domains

Engaged Community

Workflow Integration

Organizational Context & Capacity

Tools Developed or Utilized

- ACS LION Bootcamp, ACS webinars
- Patient navigation dashboard
- Role descriptions
- Onboarding and training tools
- Case studies

Goals

- Develop an evidence-based patient navigation program; incorporate patient and family feedback that contributes to improving access to care and treatment outcomes and returns patients closer to home for continued follow-up.
- Reduce health disparities among our navigated frontier and rural oncology patients.
- Develop a suite of educational and navigational tools to support patients and their loved ones during cancer treatment.

Contact

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Project Description

The Innovation in Rural Oncology Navigation (IRON) Expansion to the Mountain West initiative is the creation of a patient navigation program targeted to address barriers faced by frontier and rural patients.

Target Audience

Frontier and rural patients face numerous barriers accessing equitable health care, including being uninsured or underinsured; challenges in transportation, travel time, travel cost, lodging; and the inability to drive due to treatment side effects and lost wages. The average patient travels 600 miles round trip. Rural patients are underrepresented in oncology care, having higher cancer mortality rates and have less access to clinical trials.

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Engaged Staff and Leadership

Potential Activities

- Establish clinical and operational working groups, engaging advisory groups and clinical champions
- Identify and map internal partners and associated decision-making authority over the program's development

Case Study Examples

- Developed a robust leadership committee comprised of a multidisciplinary group of professionals to solicit program feedback and build “buy-in” by the committee. This also helped us align well with existing clinical systems like Epic.
- Developed RACI chart for roles and responsibilities of individuals involved

Organizational Context & Capacity

Potential Activities

- Determine organizational priorities to align navigation business case with the organization's strategic plan
- Identify organizational channels and timeline to routinely educate and update staff about roles and responsibilities of navigation team

Case Study Examples

- The lung navigation program was initiated by the Cancer Committee to meet Commission on Cancer Standard 8.1 and address barriers to care at the organization.
- Conduct numerous stakeholder meetings to understand the "off-ramps" within the process; when we assumed we had covered an operational area, we often realized there was another group to engage not previously on our radar

Engaged Community

Potential Activities

- Conduct or leverage an existing community needs assessment
- Establish or leverage existing community and patient advisory boards with diverse representation from the catchment area for ongoing input and feedback in the navigation program

Case Study Examples

- Key informant interviews with patients, caregivers, and healthcare professionals to determine barriers faced and helpful services
- Incorporated feedback from the Frontier/Rural Leadership Committee to design the program and make modifications based on observed barriers
- Facilitated 3 focus groups to initiate a community advisory board
- Based on collected information, developed the rural and frontier patient navigation program and addressed the key barriers to care for this population

Communication, Planning, & Implementation

Potential Activities

- Align job descriptions and professional titles with the Oncology Navigation Standards of Professional Practice
- Develop communication documents to promote the navigation program across various audiences

Case Study Examples

- The quality assurance and patient navigation teams prepared quarterly presentations to quality, operational, and medical leadership that shared navigator roles, processes, and evaluation data
- Set up individualized documents for each partnering clinic that were shared with all designated project team staff. The staff had shared access to view and edit their document, setting the precedent for collaboration and utilization of information collected.

Potential Activities

- Use workflow mapping to visualize navigation processes across all activities
- Define staff roles and responsibilities across workflows and support shared understanding of processes and protocols

Case Study Examples

- Developed navigation flags and a navigation work queue in Epic
- Streamlined referral pathways for social care
- Standardized roles, workflows, escalation protocols, and documentation
- Charted the current patient journey, identifying barriers with input from the Patient and Family Advisory Council and the Community Advisory Board

Monitoring and Evaluation

Potential Activities

- Engage a diverse, multidisciplinary workgroup to develop data collection tools and reports
- Use a logic model to visually depict relationships among program activities and intended outcomes
- Use standard outcome measures and benchmarks to establish an evaluation plan

Case Study Examples

- Developed real-time data dashboards for navigators and clinical teams with continuous integration of live data and automatic refreshes, flexible data filtering and extraction from multiple data sources, effective tracking of patient barriers to improve
- Developed standardized assessments and reports and leverage data to initiate early support services when needed

Outcomes and Effectiveness

Potential Activities

- Determine key metrics aligned with your business case
- Use outcome data to demonstrate the impact of the navigation program and supporting its sustainability

Case Study Examples

- Created clinical trial navigation reports, analyzed findings, and recorded trends and outcomes. This process included entering and reviewing data and documenting changes in program metrics.
- Refined data collection and reporting methods for more accurate tracking of patient outcomes and time to treatment.

Potential Activities

- Collaborate with internal partners, including administrative, billing, and clinical champions, to determine opportunities to bill for services provided
- Capture metrics related to missed appointments, ED visits, readmission rates, patient satisfaction, downstream revenue, patient retention
- Develop a compelling business case

Case Study Examples

- Design workflow integration to align with billing opportunities
- [ACS LION Navigation Business Case Toolkit](#)



Poll



Which 1-2 PNSAT domains would you most need resources and technical assistance for to be able to address? (select up to 2)

- Engaged Staff & Leadership
- Organizational Context & Capacity
- Funding Stability
- Engaged Community
- Communication, Planning & Implementation
- Workflow Integration
- Monitoring & Evaluation
- Outcomes & Effectiveness

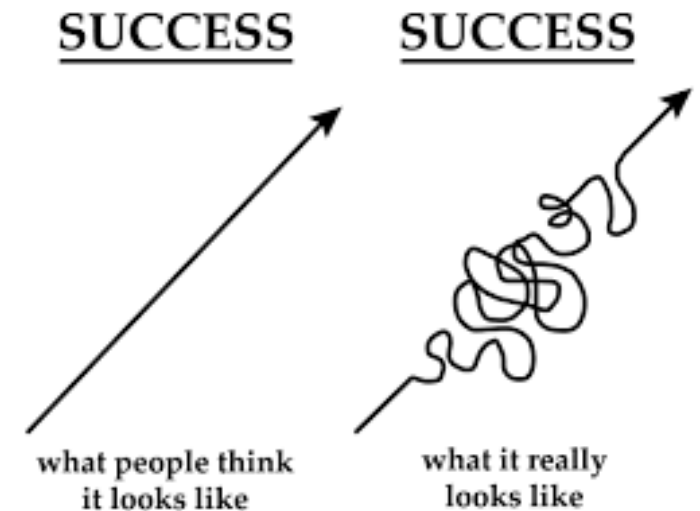
Planning for Sustainability is a Process

- **Ongoing Planning and Communication with Team Members:**

- Routine Meetings
- Working the Plan
- Adapting as Needed

- **Revisiting the Plan and Approach At Least Annually**

- **Using the Tools and Supports and Working Learning From Others**



Patient Navigation Sustainability Assessment Tool (PNSAT) Report

Patient Navigation for Preventive Cancer Screening Sustainability

Submitted by:
Erin Martinez

Date: 4/1/2019

Many factors can affect sustainability, such as funding, organizational characteristics, availability of engaged champions and elements of evaluation and communication. The Patient Navigation Sustainability Assessment Tool (PNSAT) allows clinical settings to rate their patient navigation practice on the extent to which they have processes and structures in place that will increase the likelihood of sustainability. Assessment results can then be used to identify next steps in building practice capacity for sustainability in order to position efforts for long term success.

Interpreting the Results

The table to the right presents your overall sustainability score and the average rating for each sustainability domain based on the responses you provided. The remainder of the document presents the ratings for indicators within each domain. There is no minimum rating that guarantees the sustainability of a practice.

Overall Score: 5.7

Domain	Domain Score
Engaged Staff & Leadership	6.6
Organizational Context & Capacity	5.2
Funding Stability	2.5
Engaged Community	6.7
Communication, Planning & Implementation	6.1
Workflow Integration	5.8
Monitoring & Evaluation	6.6
Outcomes & Effectiveness	6.5

Engaged Staff & Leadership: Having frontline staff and management within the organization who are supportive of the patient navigation practice.

Guiding Questions (optional, but recommended):

- Who are your organizational champions or advocates? In what ways do they advocate for the patient navigation practice (or have they advocated, or do you hope they will)?
- How would the patient navigation practice be impacted if the lead champion(s) were to leave the organization or their role?

Engaged Staff & Leadership	Response Categories						
	To little or no extent	2	3	4	5	6	To a very great extent
1. The practice engages staff and leadership throughout the process.	1	2	3	4	5	6	7
2. The practice has engaged, ongoing champions within the organization.	1	2	3	4	5	6	7
3. The practice has support from clinical team leaders.	1	2	3	4	5	6	7
4. The practice has team-based collaboration and infrastructure.	1	2	3	4	5	6	7

Notes or comments on the Engaged Staff & Leadership domain:

Engaged Staff & Leadership: Having frontline staff and management within the organization who are supportive of the practice (patient navigation for preventive cancer screening, including but not limited to CCSF)							
Sustainability Objective: [Write an objective that will enable you to increase sustainability capacity in this domain in a way that is important for your practice. The objective should be Specific, Measurable, Attainable, Realistic, and Time Bound (SMART). You may need more than one objective per domain.]							
Steps to achieve objectives: [Be very specific and include important sub-steps. Anyone should be able to pick up this document and understand what needs to happen in order to reach your objective.]	Who will do the work? [For every task, there needs to be a responsible party/parties. Who will ultimately ensure the work gets finished?]	What does success look like? [What metrics will you use to track progress on the completion of each step? How will you know it's time to move on to the next step?]	What non-financial resources are needed for this step? Where will they come from?	Due date [In the appropriate quarter, enter a specific date by which the activity must be completed.]			
				Q1	Q2	Q3	Q4
1.							
2.							
3.							

Tools and Resources for the Approach PNSAT

<https://sites.google.com/view/pnsat>

ACS NNRT Resources Page



navigationroundtable.org/resource-center/



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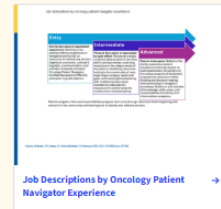
Sustainability

Resources

Search

Resource Center

Thank you to the American Cancer Society National Navigation Roundtable (ACS NNRT) members and leaders in the patient navigation community for sharing the following resources to support the community. The ACS NNRT will continue to update this resource list based on references and input from the navigation community. To add your information or share existing valuable resources, please contact nrt@caner.org.



- Resources
- Publications
- Tools
- Training

Search for resources

63 Results Sort By: Newest

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- Common Keywords
- Content Type
- Resource Type
- Sustainability Model
- Training

NEW!

Navigating Patients Across The Care & Treatment Continuum: Winter 2024 Impact Report

NEW!

Isn't there enough evidence on the benefits of patient navigation? (Editorial)

NEW!

Evaluating the Effectiveness of the National Oncology Navigation Acuity Tool: Insights From a Multisite Quality Initiative

NEW!

Sustainably Funding Patient Navigation ACS CAN Factsheet

○ Resource Center - National Navigation Roundtable

ACS Navigation Resources

- [How the American Cancer Society Supports Patient Navigation | American Cancer Society](#)
- [Cancer.org/lion](#)

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Provider implementation support

In addition to training and credentialing, ACS will continue to serve as a national convener of stakeholders interested in the implementation, evaluation, and sustainability of patient navigation. We'll offer a variety of resources to help oncology providers build effective and efficient professional navigation services.

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How the American Cancer Society Supports Patient Navigation

The American Cancer Society (ACS) believes patient navigation is critical to improving access to care for everyone. Navigation can remove barriers and improve access to care through patient-centered support from screening through survivorship.

ACS leads and funds efforts to build navigation programs, promotes public policy to support navigation, and studies the role and benefits of navigation.

[ACS CARES™](#) (**C**ommunity **A**ccess to **R**esources, **E**ducation, and **S**upport) connects people with cancer and their caregivers to information and resources chosen for each person's needs through the ACS CARES™ app. This is the only app that equips people facing cancer with curated content, programs, and services, and connects them with trained ACS team members and volunteers for one-on-one support.

[ACS Patient Navigation Roundtable](#) [↗](#) shares research and best practices that support patient navigation, helps define navigator roles, and provides resources to help cancer navigation programs continue.

[ACS Patient Navigation Initiative](#) gives grants, education, and support to 20 health systems that provide care to historically excluded populations.

[ACS Global BEACON Initiative](#) provides training, support, and grants for patient navigation in low- and middle-income countries.

[ACS CAN's](#) [↗](#) policy priorities include supporting [navigation](#) [↗](#) with a multi-year campaign to get Medicare, Medicaid, and private insurance coverage and payment for patient navigators.

[ACS Health Equity Ambassadors](#) work in their local communities to provide education for African American/Black, Asian, Hispanic/Latino, Native American, and rural populations on cancer prevention and early detection.

[ACS LION \(Leadership in Oncology Navigation\)](#) provides patient navigation training and credentialing to support the professional patient navigation workforce.

Written by

American Cancer Society

[The American Cancer Society medical and editorial content team](#)

Our team is made up of doctors and oncology certified nurses with deep knowledge of cancer care as well as editors and translators with extensive experience in medical writing.

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Poll



Has this presentation shifted your perspective on the domains you selected earlier?

- No, my choices still fits
- Yes, I'd choose differently now
 - Engaged Staff & Leadership
 - Organizational Context & Capacity
 - Funding Stability
 - Engaged Community
 - Communication, Planning & Implementation
 - Workflow Integration
 - Monitoring & Evaluation
 - Outcomes & Effectiveness

Questions

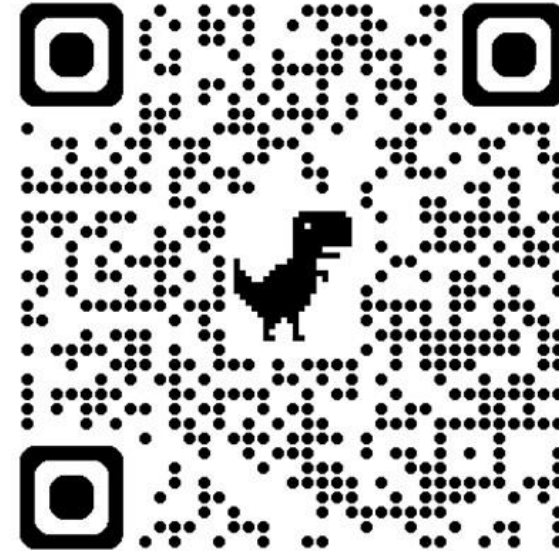


Type them in the Question-and-Answer box
at the bottom of your screen

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Promising Practices Supporting the Sustainability of Patient Navigation: An Implementation Guide



Thank you!

The Sanofi logo, featuring the word "sanofi" in a lowercase, sans-serif font. The letter "i" is stylized with a purple dot.

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The Genentech logo, featuring the word "Genentech" in a blue, sans-serif font. Below it, the text "A Member of the Roche Group" is written in a smaller, italicized font.

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TECHNOLOGY WITH PURPOSE: HOW NAVIGATORS CAN LEAD ETHICALLY, STRATEGICALLY, AND EQUITABLY

November 19, 2025 | 3 PM EST



Pia Banerjee, PhD
Director, Cancer Innovation & Transformation
American Cancer Society



Linnea VanPelt, RN, BSN, OCN
Manager, Cancer Support Services
Lineberger Comprehensive Cancer Center at
UNC Basnight Cancer Hospital



Christina Bach, MBE, MSW, LCSW, OSW-C
Psychosocial Content Editor
Oncolink.org
Financial Navigation Specialist
Cancer Support Community Helpline



Linda Fleisher, PhD, MPH
Vice Chair, ACS NNRT
Principal Investigator
LINC Lab at Fox Chase Cancer Center

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Webinar ACS NNRT October 22,
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Thank you!

Polling Questions

Question 1:

Which 1-2 PNSAT domains would you be most interested in focusing on for sustainability capacity building efforts? (select up to 2)

- Engaged Staff & Leadership
- Organizational Context & Capacity
- Funding Stability
- Engaged Community
- Communication, Planning & Implementation
- Workflow Integration
- Monitoring & Evaluation
- Outcomes & Effectiveness

Question 2:

Which 1-2 PNSAT domains would you most need resources and technical assistance for to be able to address? (select up to 2)

Same response options as Question 1