



CEDARS-SINAL



Moving Clinics Upstream

In Phase 2 of Moving Clinics Upstream (MCU), we invite your team to get tangible with your social needs project. Now that you've reflected on how what you learned in your interviews can inform your approach to addressing food security/transportation, it's time to: plan out the work to be done, generate and prioritize the new ideas or approaches you want to try, and make those approaches real and get feedback.

The new year is also a great opportunity for you to talk with leadership about the ways your organization hopes to build its overall capacity in addressing social needs on a strategic level, so that you can re-align your project activities with those goals.

Find the program timeline with our activities and objectives [here](#).

Phase 2: Getting Tangible January 2020-August 2020 (8 months)

1. ASAP: Get grounded for action.

- Re-establish monthly meetings with your new coach.
- Reflect on what insights you've had about your problem and project to date, and what more you need to learn through working on your project.
- Review the MCU social needs organizational capacity baseline assessment results with your coach – specifically your team's self-reported data. Choose one organizational capacity area from the assessment to strengthen through your project activities, and communicate the area you chose to your coach. You will also identify your capacity building focus in your project charter (see below).
- Discuss whether your team is interested in receiving project support through an optional (and fun!) [design sprint](#), and complete the interest form.
- Register for the [CCI Academy](#), our online learning community. We'll periodically host group conversations there and share work [in the forums](#).

2. By February 28: Develop a [project charter](#) to guide your project to success through to February 2021, and share the document with your coach. You will share pieces from your charter at the March 11 convening.

If your organization has a charter template you are already using, submit your organization's charter and append any information we ask for in our charter that isn't in yours. Under the Milestones/Deliverables section of your charter, please integrate the following activities:

- Review and create an inventory your organization's existing approach and workflows for:
 - Identifying social needs risks in your population
 - Navigating people to / delivering social services (i.e. food/transportation).
- Work with the team at the specific site hosting your project to develop a **process map or workflow** (see [link A](#), [link b](#)) for how social needs are currently identified and services delivered (however informal). Include any informal partnerships or referral relationships that take place, and identify where there are gaps in key social services (not only food/transport).
- Time and space to:
 - i. Generate ideas with frontline staff, and ideally the target population, around what new things your organization will try to help identify and address food/transportation issues. Include any partnerships you might want to explore.
 - ii. With leadership input, prioritize which ideas to pursue in 2020.
- Create a new process map and workflow that shows how you plan to create or tweak your service/referral model to address food or transportation needs.
- Finalize metrics for success that will be used to monitor and assess your interventions.

- Develop a timeline for testing a set of specific ideas/approaches the team will build and test at **at least one clinic site**, and when you will do it. Integrate this timeline into your milestones.
- If you apply for and are chosen to host a [design sprint](#), you will add that activity as a milestone in your charter.*

3. March - August: Carry out your project charter; revise regularly.

- Test your new approaches at one or more sites, collecting feedback as you go.
- Use feedback and the success metrics you are monitoring to continuously improve your approach.
- Make changes to your project charter based on what you learn from your activities and when organizational shifts arise.
- Review your project charter with your coach as things change. You will be asked to share information about your project with your peers every so often.

4. August 2020 – February 2021: Phase 3

- To be updated in summer 2020. These activities will involve standardizing processes, reporting on results, spreading within your organization, and securing additional funding for sustainability.

Resources to Support Your Work			
Portal	https://www.careinnovations.org/moving-clinics-upstream-portal/		
Team List	https://www.careinnovations.org/moving-clinics-upstream-portal/community/		
CCI Staff	Laura Blumenthal Sr. Program Manager	laura@careinnovations.org	
	Diana Nguyen Sr. Program Coordinator	diana@careinnovations.org	
Coaching Support	Elevation Health Partners Deena Pourshaban Natasha Doshi Rachel Proud	deena@elevationhealthpartners.com natasha@elevationhealthpartners.com rachel@elevationhealthpartners.com	<ul style="list-style-type: none"> • Monitors program experience, connects with additional resources, provides support & guidance on implementing social needs programs • Available through August 2020 by phone & on site
Design Thinking Mentor	Jill Rees, Licensed Clinical Psychologist & Coach, West County Health Centers	jillreesphd@gmail.com	<ul style="list-style-type: none"> • Thought partner on bringing creativity to your process, getting unstuck, building buy-in, making ideas real & testing them • Available through August 020 by phone