

# Partnership Assessment Tool for Health: Bridging Community-Based Human Services and Health Care

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Presentation to **Center for Care Innovations**  
**ROOTS Program Convening**

March 8, 2018

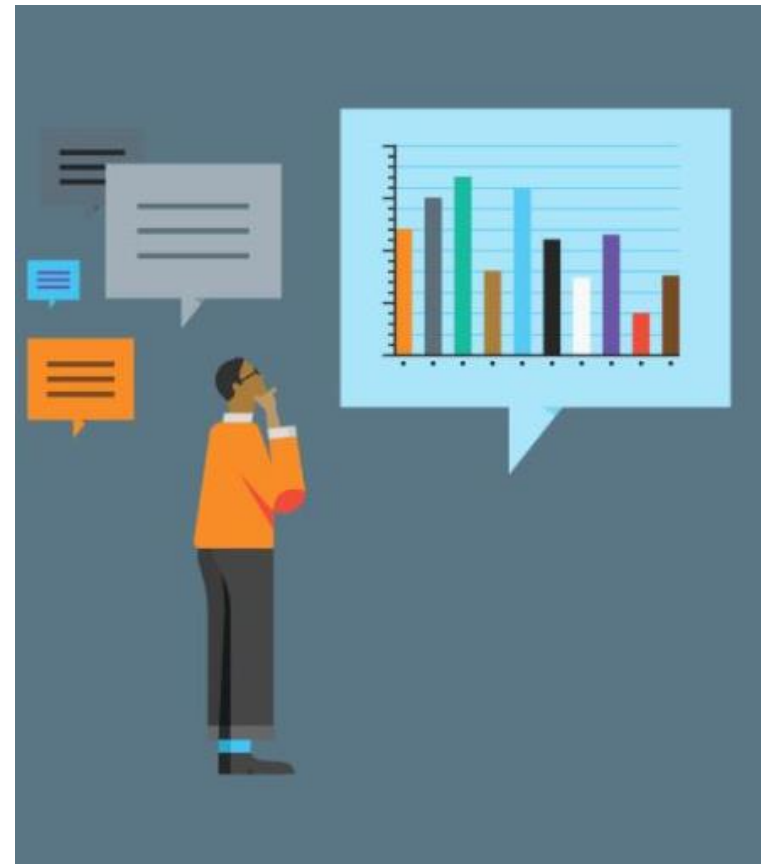
Presented by: Annie Chang



# Our Focus

Nonprofit Finance Fund® (NFF®) advances missions and social progress in underserved communities through **financing, consulting, partnerships,** and **knowledge-sharing** that empower leaders, organizations, and ideas.

A leading CDFI, NFF currently manages over \$310 million. Since 1980, we have provided almost \$700 million in financing and access to additional capital in support of over \$2.3 billion in projects for thousands of organizations nationwide.



# Our Work on Social Determinants of Health

- NFF's Advisory Services team has helped organizations across the health and healthcare sectors build the knowledge and capacity needed to respond strategically to the shifting health and healthcare landscape.
- Since 2013, our Financial Services team has provided \$68MM in loans and \$80MM in New Markets Tax Credits for community health organizations, leveraging over \$325MM in capital from co-investors.
- NFF is currently engaged in various efforts to foster improved health and human service partnerships aimed at social determinants of health across the country. These include:
  - AIM Healthy Investment Fund
  - The Colorado Health Foundation Change Capital Initiative
  - The Healthy Outcomes Initiative
  - The Partnership for Healthy Outcomes

# Workshop Goals

- Understand progress toward benchmarks characteristics of effective partnerships
- Be able to identify areas for further development
- Guide strategic conversation between partners



# Agenda

- **Introduction to NFF and Workshop Goals**
- **Overview of Partnership Assessment Tool for Health (PATH) and Team Discussions**
  - Internal and External Relationships
  - Service Delivery and Workflow
  - Funding and Finance
  - Data and Outcomes
- **Wrap-Up: Leading Partnership Discussions**

# Partnership for Healthy Outcomes: PATH Tool Development



*Goal: To identify, analyze, and distribute examples and lessons about partnership models between community-based organizations and healthcare organizations, particularly those that service low-income and/or vulnerable populations.*

Request for Information



Partnership Case Studies



Knowledge Sharing



The Partnership for Healthy Outcomes: a year-long project of Nonprofit Finance Fund, the Center for Health Care Strategies, and the Alliance for Strong Families and Communities, with generous support from the Robert Wood Johnson Foundation, which captured and shared insights for partnerships between healthcare and community-based organizations, particularly those that serve low-income and/or vulnerable populations.

# Partnership Information Received



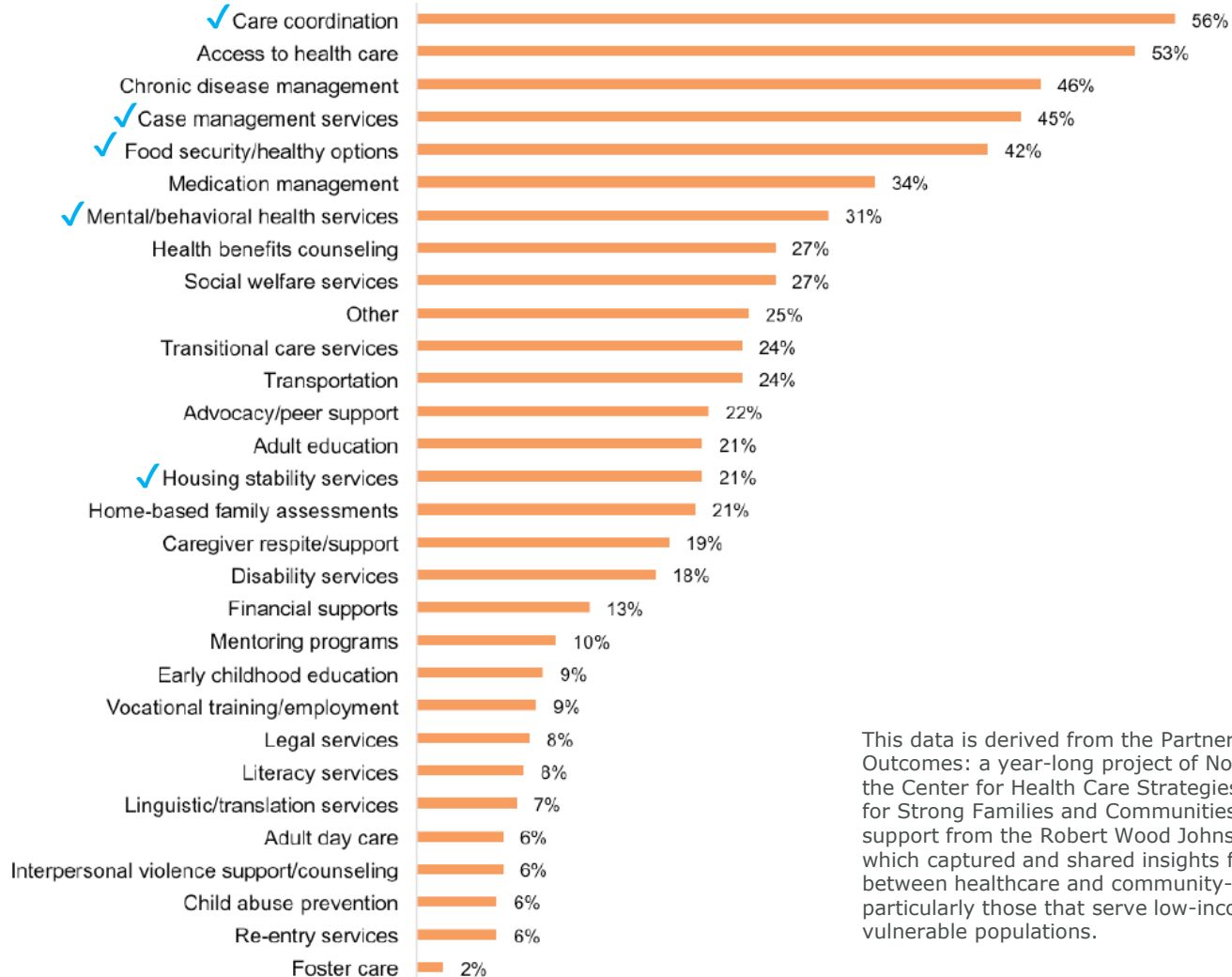
- Completed by **representatives from:**
  - Nonprofit or for-profit CBOs
  - Health care organizations
  
- Focus on **low-income and vulnerable** populations
  
- **Purpose:**
  - Identify promising models of and challenges to building effective partnerships
  - Inform funding and policies
  - Advance effective partnerships across the nation
  
- **Convenience, self-selected** sample

The RFI defined partnership as: “a structured arrangement between a health care organization (e.g., health system, hospital, provider, insurer, state or local public health department) and nonprofit or for-profit community-based organization (e.g., housing organization, workforce development agency, food bank, early childhood education provider) to provide services to low-income and/or vulnerable populations.”

# Partnership Services



Please select the category that best describes the services provided through the partnership (n=203)



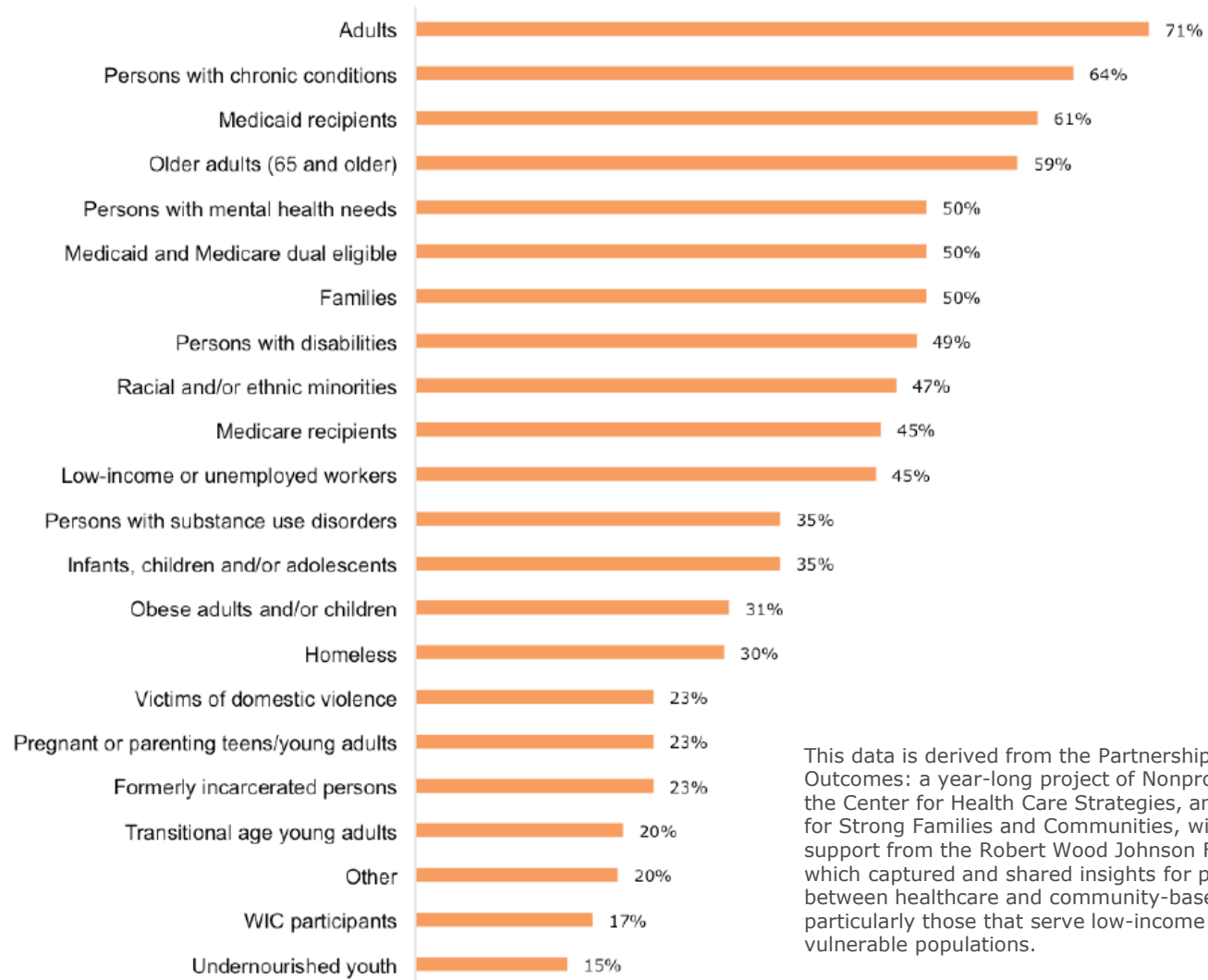
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# Target Populations



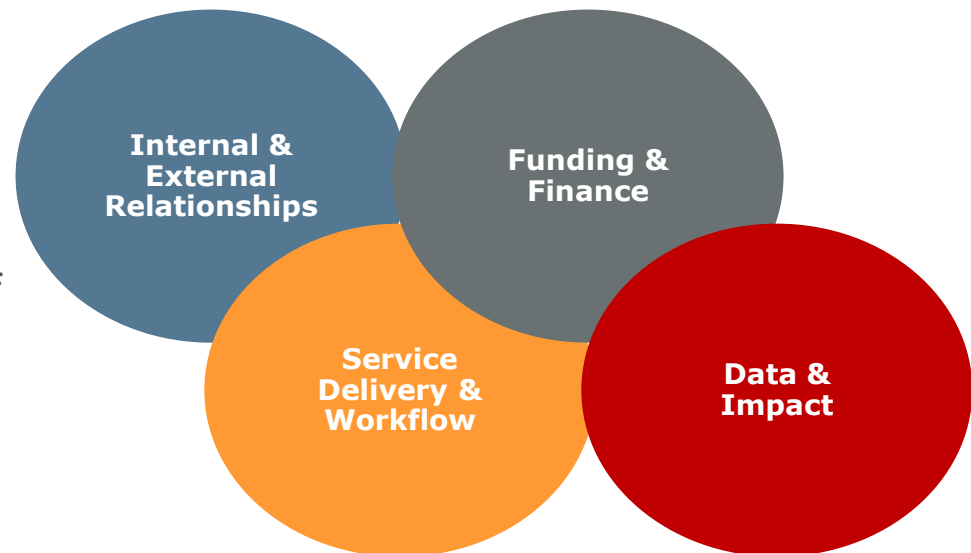
Please select the targeted population(s) served by the partnership (n=203)



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# Partnership Assessment Tool for Health (PATH)

- A tool for CBOs and health care organizations **currently engaged** in a partnership to:
  - Identify existing strengths and gaps
  - Consider areas growth and change
  - Align partners around key objectives
- Includes **self-assessment questions** and a **framework to focus strategic conversations** between partners
- The tool focuses on four **core elements** of partnership:
- Contributes to **growing body** of tools and resources in the field



# How to Use PATH

*What will I find in the tool?*

- Partnership Check-Up
- Partnership Discussion Guide

- Designed to be completed by two partner organizations (a healthcare organization and a CBO) who are actively engaged in partnership

*Who should fill out the tool?*

*How do I complete the tool?*

- Complete the Partnership Check-Up either with your partner or individually
- Review the summary chart together
- Use Partnership Discussion Guide to focus on 3-5 areas requiring more development

# Internal and External Relationships

A core element of effective partnership is having **strong relationships** among partners and with other stakeholders. This section focuses on your partnership's progress towards internal and external relationship benchmarks.



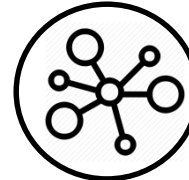
## Shared Goals

*My partner and I share an understanding of the goals our partnership seeks to achieve.*



## Partner Value

*My partner and I bring complementary expertise to the partnership and maximize the unique value we each bring.*



## External Relationships

*We fully leverage our relationships with the community, funders, and other professional networks to advance our partnership's goals.*

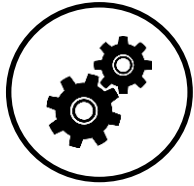


## Internal Buy-in

*Leadership and key staff at each partner organization are supportive of the partnership and the organization's participation in it.*

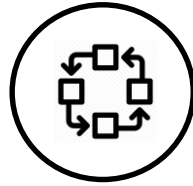
# Service Delivery and Workflow

A core element of effective partnership is **delivering appropriate services** in a way that achieves the goals of the partnership. This section focuses on your partnership's progress toward service delivery and workflow benchmarks.



## Service Alignment

*The services our partnership provides enable us to achieve our goals.*



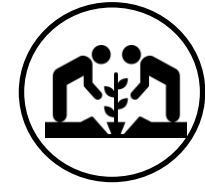
## Workflow Process

*Our workflow processes allow the partnership to deliver services effectively and efficiently.*



## Service Delivery Capacity

*We have the necessary time, people, and expertise to deliver effective services to our target*



## Engaging the Community

*We engage our target population to inform and improve service delivery.*

# Discuss with Your Team

Referencing the questions on the PATH handout, spend 10 minutes to discuss with your team if you have already discussed these questions with your partner organization or would it help you with the following:

- **Understand progress** toward benchmarks characteristics of effective partnerships
- Be able to identify areas for **further development**
- Guide **strategic conversation** between partners



# Funding and Finance

A core element of effective partnership is having a **funding model** that supports service delivery and enables the partnership to achieve outcomes. This section focuses on your partnership's progress toward funding and finance benchmarks.



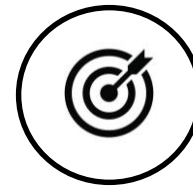
## Covering Full Cost

*We understand the full cost of partnership and incorporate this into our funding model.*



## Securing Revenue

*We have reliable revenue streams sufficient to cover the full cost of partnership.*



## Financial Goals and Priorities

*My partner and I are aligned on the financial goals of our partnership, and understand each others' financial priorities.*

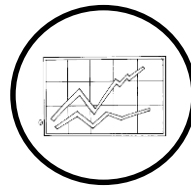
# Data and Outcomes

A core element of effective partnerships is having the ability to **collect and use data** to inform decision-making and demonstrate outcomes. This section focuses on your partnership's progress toward data and outcomes benchmarks.



## Data Collection

*The data our partnership collects accurately conveys progress toward our shared goals.*



## Data Usage

*Our partnership uses the data we collect to improve the way we deliver our services.*



## Demonstrating Outcomes

*We are able to demonstrate and articulate our outcomes using the data we collect.*



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# Wrap-up Discussion: Leading Partnership Discussions

- How will you approach **partnership discussions differently?**
- Are there any **immediate opportunities** that you will be having? How will today's discussion inform those discussions?
- Based on what was discussed, what is the most important **challenge** to tackle, in order to accelerate and sustain CBO-healthcare partnerships?



## Thank you

To learn more about NFF, visit us at [nff.org](http://nff.org)

And stay connected:  
[nff.org/socialmedia](http://nff.org/socialmedia)



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