



ROOTS In-Person Session 2

Thursday, March 8, 2018 from 9:00am-4:30pm
 The Millwick, 800 E 4th Pl, Los Angeles, CA 90013

Objectives:

1. Take a deep dive into **partnerships and change management** and walk away with **ideas and strategies** to move your ROOTS work forward.
2. Connect with content experts and consider ways of **utilizing their technical assistance** beyond the session.
3. Connect with **peers and share updates and challenges related** to your individual projects and overall progress.

9:00am	Breakfast & Registration
9:30 – 10:00	Welcome, Overview of the Day, & Introductions CCI and faculty will provide an overview of the day, including a preview of what's in store during the breakout sessions.
10:00 – 10:45	Collaborations between CBOs and Primary Care We'll be joined by Mark Ryle, CEO of Project Open Hand, a Bay Area organization that provides meals to seniors and those that are critically ill. Mark will talk about POH's work on food insecurity, and successes, challenges, and lessons learned from the CBO perspective of forming and sustaining partnerships.
10:45 – 11:00	Break & Stretch
11:00 – 12:15	Break Out Session #1 You'll have the opportunity to attend one of three sessions: <ul style="list-style-type: none"> • Health Leads: Change Management to Address Social Needs • Collaborative Consulting: Systemic Leadership • Nonprofit Finance Fund: Partnership Agreement Tool for Health (PATH)
12:15 – 1:00	Lunch
1:00 – 2:15	Breakout Session #2 You'll have the opportunity to attend one of three sessions: <ul style="list-style-type: none"> • Health Leads: Change Management to Address Social Needs (<i>duplicate session</i>) • Collaborative Consulting: Partnership Design • Nonprofit Finance Fund: National Findings: Current Partnership Efforts & Best Practices
2:15 – 2:30	Break & Stretch
2:30 – 3:15	Team Time: What are you Learning and What are the Next Steps? Teams will have time to meet and discuss key takeaways from the sessions, how to the takeaways to your work, and next steps. Session faculty will be available to consult on a 1:1 basis. Teams will have 2 minutes to report out your next steps.
3:15 – 3:30	Evaluation Updates
3:30 – 4:15	Themed Breakout Discussions We will break out into discussion group focused on the following topic areas: <ul style="list-style-type: none"> • Addressing Food Insecurity: What's Working & What's Not • Empathic Inquiry & How to Ask Tough Questions • Community & Partner Engagement Techniques
4:15 – 4:30pm	Wrap Up, Evaluation, & Closing

Faculty



Project Open Hand™
meals with love



Mark Ryle, CEO Project Open Hand

Project Open Hand services assist those with AIDS/HIV as well as critical illnesses such as breast cancer and diabetes. They also provide daily warm, nutritious meals for seniors and adults with disabilities fighting hunger. Project Open Hand's vision is that no one who is sick or elderly in our community will go without nutritious meals with love. Some of their recent work include:

- **Food Is Medicine Coalition:** Project Open Hand is a proud founding partner of the Food Is Medicine Coalition (FIMC). The FIMC is a volunteer association of nonprofit, medically-tailored and nutrition services (FNS) providers from across the country, which includes our sister organizations God's Love We Deliver in New York City, Community Servings in Boston and Project Angel Heart in Denver, among others. The FIMC's purpose is to advance public policy that supports access to food and nutrition services for people with severe and/or chronic illnesses.
- **Food = Medicine Pilot Study:** Seeking a greater voice in the public health conversation, Project Open Hand partnered with UCSF on scientific studies tracking data of health benefits associated with Food as Medicine. Our scientific collaboration with physicians and researchers from UC San Francisco demonstrates with data how the healing power of nutritious food is crucial for serving the critically ill.
- **Zuckerberg San Francisco General Hospital - Project Open Hand Partnership:** Confronting the growing problem of food insecurity and its relation to chronic disease, Project Open Hand and Zuckerberg San Francisco General Hospital have partnered to create a fully integrated program of primary care, medically tailored and 100% nutritious meals as well as related services among the medically underserved adults of the Bay Area. The partnership, which launched in January of 2016, involves select SFGH patients experiencing a high volume of hospitalization and readmission rates due to chronic congestive heart failure, will be referred to Project Open Hand. Discharged patients receive a bag of healthy groceries from Project Open Hand and are offered opportunities to participate in the study conducted by Project Open Hand nutritionists.

- **Adults With Disabilities Meal Program at 730 Polk Street:** In December of 2016, Project Open Hand opened a unique dining site at 730 Polk Street for our Adults with Disabilities population. In that beautiful corner space on Willow and Polk, we began serving a hot lunch for upwards of 50 clients/day. This is the first Adults with Disabilities site in the San Francisco to exclusively serve this population. It addresses a significant challenge of food insecurity among adults with disabilities. The SF Department of Aging and Adult Services ("DAAS") requested that Project Open Hand launch this unique service, hoping to close a gap in services and create a model for other agencies and community centers throughout San Francisco. The program is completely funded by DAAS.
- **Getting To Zero Initiative:** Launching in 2017, Project Open Hand will be offering a new form of delivery service. We're taking our services to our clients' neighborhoods. With funding support from the City of San Francisco and the Getting To Zero Coalition, Project Open Hand is set to embark on a new mobile service delivery. We've added to our delivery fleet and we'll be outfitting two vehicles to provide all of the services we provide at 730 Polk Street (groceries, hot and frozen meals, nutrition and client services). Our first two colocation sites will be in the most vulnerable and underserved areas of the city: the Mission and Bayview neighborhoods. We'll co-locate at Mission Neighborhood Health Center and Southeast Health Center during peak client times and bring our services directly to the neighborhood.



<https://healthleadsusa.org/>

Health Leads is a non-profit social enterprise that envisions a healthcare system that addresses all patients' essential resource needs as a standard part of quality care. For more than 20 years, Health Leads has worked with leading healthcare organizations to create sustainable, high-impact and cost-effective social needs interventions that connect patients to the community-based resources they need to be healthy-from food to transportation to healthcare benefits.



Therese Wetterman

Director, Learning Network,
Health Leads



Andrea LeBeouf

Program Director, Southern
California, Health Leads



Artair Rogers

Manager of West Coast
Partnerships, Health Leads

Session: Change Management Strategies to Support SDOH Interventions (Duplicate Session: 11am-12:15pm & 1-2:15pm)

Goal: Learn how Health Leads' partner organizations have navigated change management issues as they adopted SDOH interventions in the practice setting & apply best practices for managing change to your unique situation.

This session will include:

- 1) Health Leads' framework for social needs integration and approaches to change management
- 2) Practical approaches to support successful adoption of social needs programs through case studies of Health Leads' partners:
 - a. Live discussion of approaches for managing change at Kaiser Permanente and Contra Costa Regional Medical Center
 - b. Written case studies from the Dimock Center, Arkansas Children's Hospital, and Metro Community Provider Network
- 3) Opportunities to apply best practices for managing change in your individual settings
- 4) Changes to engage with each other to share and discuss change management approaches related to addressing social needs in the clinical setting



<https://collaborativeconsulting.net/>

Collaborative Consulting is a specialist consultancy at the heart of medical-social integration, working with healthcare leaders to develop creative, custom solutions that answer the biggest questions facing the industry today. They work together with our clients and partners to take bold, strategic ideas and turn them into progressive, purposeful action. Collaborative Consulting works in the following focus areas:

- Multi-Stakeholder Collaborative Design
- Cross-Sector Partnership Development
- Capacity Building and Leadership Development
- Change Activation and Management



Lori Peterson

Cross-Sector Partnership Development, Multi-Stakeholder Design and Facilitation



Jessica Oster

Leadership Coaching & Change Management

Session#1: Systems Leadership (11am-12:15pm)

This session will focus on:

- 1) Awareness of the larger system
- 2) Transforming relationships among those that shape the system
- 3) Understand risk and incentives across multiple entities
- 4) Influence over control

Session#2: Partnership Design (1-2:15pm)

This session will focus on thinking about the key elements behind designing and sustaining partnerships, including:

- 1) Entities: Organizations, roles, and contributions
- 2) Financing: Funding mechanisms, start-up and long term, resources needed
- 3) Operations: Integrated organizations charts, process and systems, data sharing
- 4) Leadership: Oversight, decision-making, and style
- 5) Performance: Goals & objectives, monitoring processes, and data collection
- 6) Future: Sustainability, growth & expansion, and spread



<https://www.nonprofitfinancefund.org/>

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, NFF 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.



Alexandra Chan
Associate Director,
Advisory Services



Annie Chang
Manager,
Advisory Services

Session#1: Partnership Assessment Tool for Health (PATH) (11am-12:15pm)

Introduction to NFF's PATH as a resource to support ROOTS cohort in:

- Understanding progress toward benchmarks characteristic of effective partnerships
- Identifying areas for further development
- Guiding strategic conversation between partners

Session#2: National Findings: Current Partnership Efforts & Best Practices (1pm-2:15pm)

This session will focus on reviewing and discussing the learnings from NFF's report which captures and analyzes information attained from a survey of more than 200 current partnerships serving all 50 US states.