ROOTS Program
March 8, 2018
In-Person Session #2
ROOTS CCI Program Team

Megan O’Brien

Veenu Aulakh

Diana Nguyen
ROOTS Core Faculty

SIREN Team at UCSF, **Evaluator**

Sadena Thevarajah, JD, Health Begins, **TA Provider**

Dr. Jim Meyers, **Program Coach**
Goals for the Day

Take a deep dive into **partnerships and change management** and walk away with **ideas and strategies** to move your ROOTS work forward.

Connect with content experts and consider ways of **utilizing their technical assistance** beyond the session.

Connect with **peers and share updates and challenges related** to your individual projects and overall progress.
Faculty

**Areas of Focus:**
- Implementing Social Needs Strategy
- Developed Social Needs Roadmap & Screening Toolkit

**Session:**
- Change Management

[https://healthleadsusa.org/](https://healthleadsusa.org/)

**Areas of Focus:**
- Creating Partnerships between Health Care & Social Service Organizations
- Org Development & Change Management
- Fostering Community Agency

**For March 8:**
- Systemic Leadership
- Partnership Design

[https://collaborativeconsulting.net](https://collaborativeconsulting.net)

**Areas of Focus:**
- Financial capacity building among nonprofits/CBOs
- Sustainability & Partnership Development

**For March 8:**
- PATH Tool
- Best Practices for Developing Partnerships

Today’s Agenda

- 9:30 – 10:00: Welcome & Overview
- 10:00 – 10:45: Project Open Hand
- 11:00–12:15: Break Out, Part 1
- 12:15 – 1:00: Lunch
- 1:00 – 2:15: Break Out, Part 2
- 2:30 – 3:15: Team Time & Reportback
- 3:15 – 3:30: Evaluation Updates
- 3:30 – 4:15: Themed Breakouts
- 4:15 – 4:30pm: Evaluation, & Closing
In-Person
- Session #1
  - 10/5/17
  - Bay Area
- Site Visits
  - 1/31/2018: ROOTS Clinic
  - 2/22-23/18: KKV & WHC
  - Los Angeles
- Session #2
  - 3/8/18
  - TBD
- Session #3
  - 8/9/18

Remote Support
- Coaching: Monthly Team Calls

Milestones & Program Deliverables
- Milestone #1: Team Build, Data Review, Finalize Target Population & Need, Consider Staff & Partners, Initiate Metrics
- Milestone #2: Start Project Operations**, Design Project Work, and Marketing, Form Partnerships
- Milestone #3: Analyze Progress, Redesign, Formulate Sustainable Operations
- Project Charter
  - 11/17/17
- Partners Agreements
  - 3/18
- Share Lessons Learned
  - 8/18 - 10/18

Evaluation Activities
- Interviews with Leads
  - 10/17-11/17
- Provider/Patient Surveys
  - 12/17 - 1/18
- Midpoint interviews (phone)
  - 4/18 (instead of coaching call)
- Surveys to gauge satisfaction with sessions, webinars, TA, etc

**Projects should have at least 9 months of implementation.
Where is home?

Who are your ancestors?

How do you know what you know?

What is your oppression?
Site Visit Recap & Warm Up
Roots Clinic Site Visit 1/31
KKV Site Visit 2/22
Waimanalo Site Visit 2/23
Takeaways

• Hire people with lived experience of the patient population you are serving

• Role: "We are responsible for the economic health of the community"

• Integration mindset: Integrate SDOH in order to sustain it, otherwise it is at risk for disappearing

• "Never get ahead if we don't move more upstream...but we don't want to do it all ourselves"

• Create a welcoming space and see what happens!

• Role of food, land, & culture in health

• Importance of listening and talking story
  
  • Protocol is important, but so is coming together to eat food and be in relationship together
  
  • Listening is a gift, instead of using standardized tools, what about uplifting/putting at the center the people with those gifts?
**Critical Questions**

- What is your name?
- Where is home?
- Who are your ancestors?
- How do you know what you know?
- What is your oppression?
- How is your body feeling?
- How are you feeling?
Warm Up: Deep Listening & the Concept of Home

• Find a partner.

• **Round 1**: You’ll each take 1 minute to talk about what home means to you. The other person will listen, without asking questions or adding anything.

• **Round 2**: You’ll each take 1 minute to talk about what home means to you. The other person can listen or ask questions.

• A bell will ring after each 1 minute so you know when to switch.
Breakout Session Preview
Alexandra Chan
Associate Director, Advisory Services

Annie Chang
Manager, Advisory Services
Session #1: Partnership Assessment Tool for Health (PATH)

• 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

• Review and discussion of 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
Lori Peterson
Cross-Sector Partnership Development, Multi-Stakeholder Design and Facilitation

Jessica Oster
Leadership Coaching, Change Management
Session #1: Systems Leadership

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

Session #2: Partnership Design

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<tr>
<th>Entities</th>
<th>Financing</th>
<th>Operations</th>
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<tbody>
<tr>
<td>Organizations Roles Contributions</td>
<td>Funding Mechanism Start-up and Long Term Resource needs</td>
<td>Integrated Org Chart Process and Systems Data and Info Sharing</td>
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Collaborative Consulting
Where Ideas Evolve Into Action
Session #1 & #2: Change Management Strategies to Support SDOH Interventions

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

How do you know what you know?

What is your oppression?

Questions?
Collaborations between Primary Care & CBOs

Project Open Hand
Break (15 minutes)
Breakout Sessions #1

1. **Health Leads**: Change Management to Address Social Needs
2. **Collaborative Consulting**: Systemic Leadership
3. **Nonprofit Finance Fund**: Partnership Agreement Tool for Health (PATH)
LUNCH (45 minutes)
Breakout Sessions #2

1. **Health Leads**: Change Management to Address Social Needs *(duplicate session)*

2. **Collaborative Consulting**: Partnership Design

Break (15 minutes)
Team Time (45 minutes)

What are you Learning & What’s Next?
Team Time

• 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 1 minute to report out your next steps.
Evaluation Updates (15 mins)
Themed Breakout Discussions

1. Addressing Food Insecurity: What’s Working & What’s Not
2. Empathic Inquiry & How to Ask Tough Questions
3. Community & Partner Engagement Techniques
Wrap Up & Evaluation
Partnership Agreements (March 18)

• If you have an agreement in place, send to Diana (diana@careinnovations.org).

• Otherwise send a 1 page update and include:
  1. Who are you partnering with?
  2. How did the partnership start?
  3. Successes
  4. Challenges/Lessons Learned
  5. What’s Next
ROOTS Portal

• Access past newsletters, SDOH resources, webinar recordings, & program documents

• Link to monthly milestone updates

www.careinnovations.org/roots-portal
Thank you!

For questions contact:

Megan O’Brien
Value-Based Care Program Manager
Center for Care Innovations
mobrien@careinnovations.org

Diana Nguyen
Program Coordinator
Center for Care Innovations
diana@careinnovations.org