



# 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/>



## 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>



## Areas of Focus:

- Financial capacity building among nonprofits/CBOs
- Sustainability & Partnership Development

## For March 8:

- PATH Tool
- Best Practices for Developing Partnerships

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



# 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



A photograph showing a variety of fresh green herbs and a mortar and pestle. The herbs are laid out on a white surface, with some in bunches and others scattered. A mortar and pestle, made of grey stone, is positioned in the center, containing several pieces of ginger root. The background is a plain white surface, possibly a table or countertop.

# Housekeeping Reminders









# ROOTS Roadmap



### In-Person












	 <b>Session #1</b> 10/5/17 Bay Area	 <b>Site Visits</b> 1/31/2018: ROOTS Clinic 2/22-23/18: KKV & WHC	 <b>Session #2</b> 3/8/18 Los Angeles	 <b>Session #3</b> 8/9/18 TBD
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### Remote Support





**Coaching: Monthly Team Calls**

 <b>Kickoff Webinar</b> 9/14/17	 <b>Content Webinar</b> 11/16/17	 <b>Idea Sharing Webinar</b> 12/7/17	 <b>Program Update Call</b> 1/10/18	 <b>Content Webinar</b> 2/8/18	 <b>Idea Sharing Webinar</b> 4/5/18	 <b>Content Webinar</b> 5/10/18	 <b>Idea Sharing Webinar</b> 6/7/18	 <b>Content Webinar</b> 7/12/18
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### Milestones & Program Deliverables








**\*\*Projects should have at least 9 months of implementation.**

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### Evaluation Activities



 <b>Interviews w/ Leads</b> 10/17-11/17	 <b>Provider/Patient Surveys</b> 12/17-1/18	 <b>Midpoint interviews (phone)</b> 4/18 (instead of coaching call)	 <b>Interviews (onsite)</b> 7-8/18	 <b>Surveys + project metrics collection</b> 9/18-10/18
<b>Surveys to gauge satisfaction with sessions, webinars, TA, etc</b>				

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CCI  
CENTER FOR CARE  
INNOVATIONS

Who are your ancestors?

Questions?

How do you know what you know?

What is your oppression?

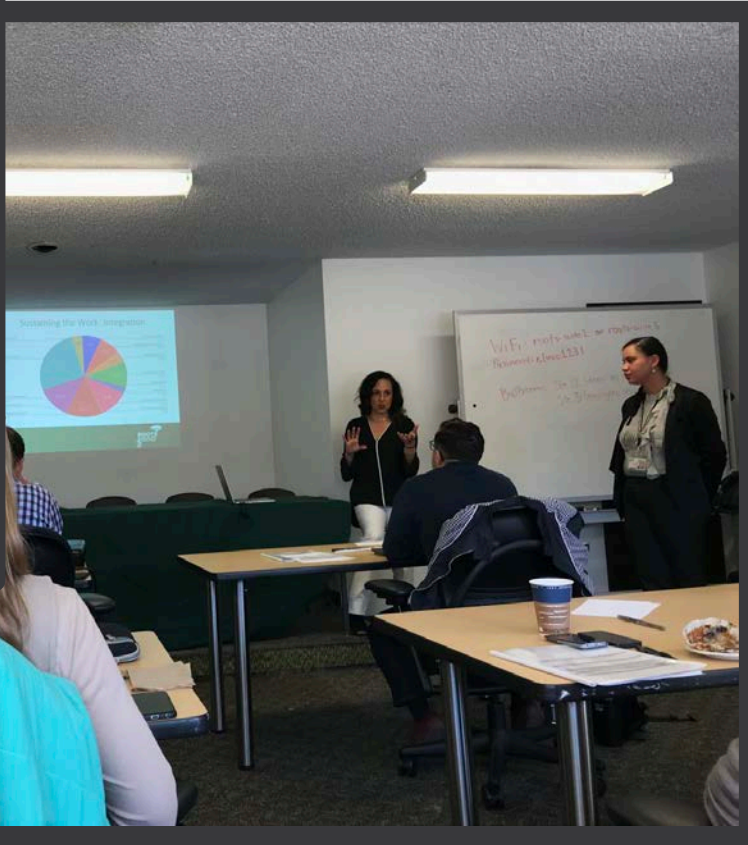




## Site Visit Recap & Warm Up



# Roots Clinic Site Visit 1/31









# KKV Site Visit 2/22









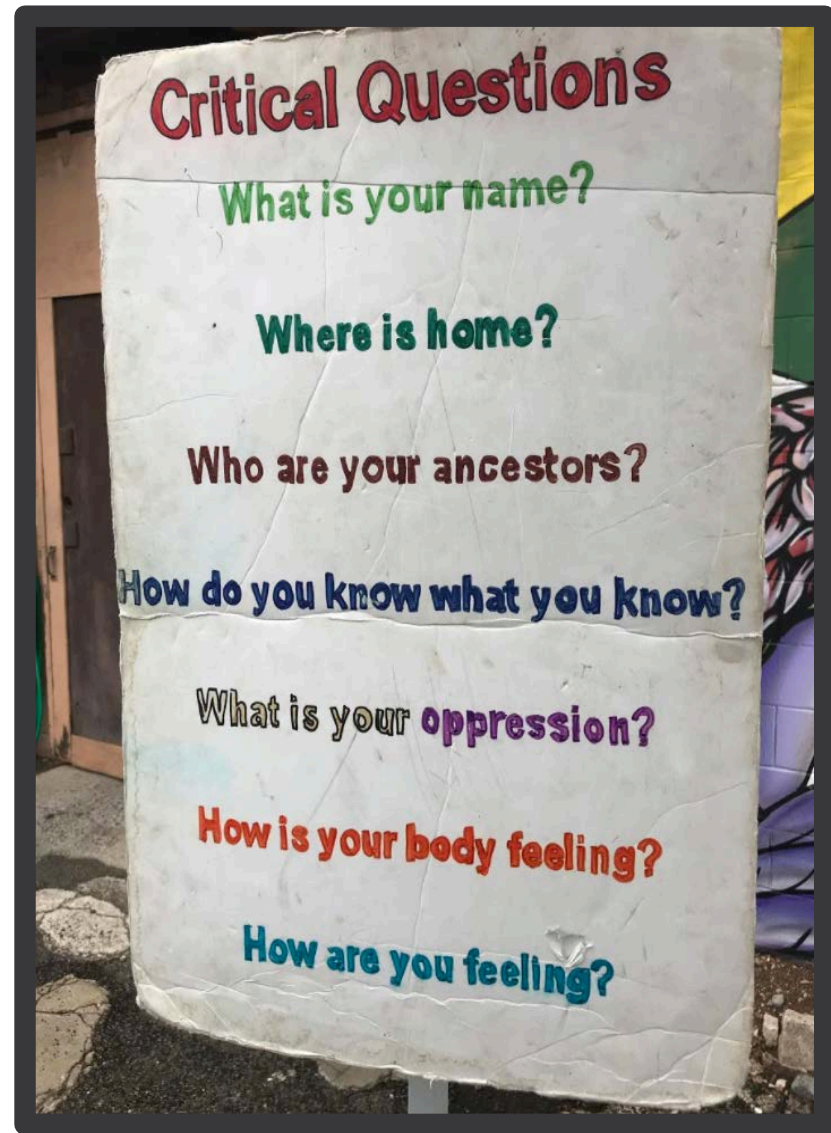
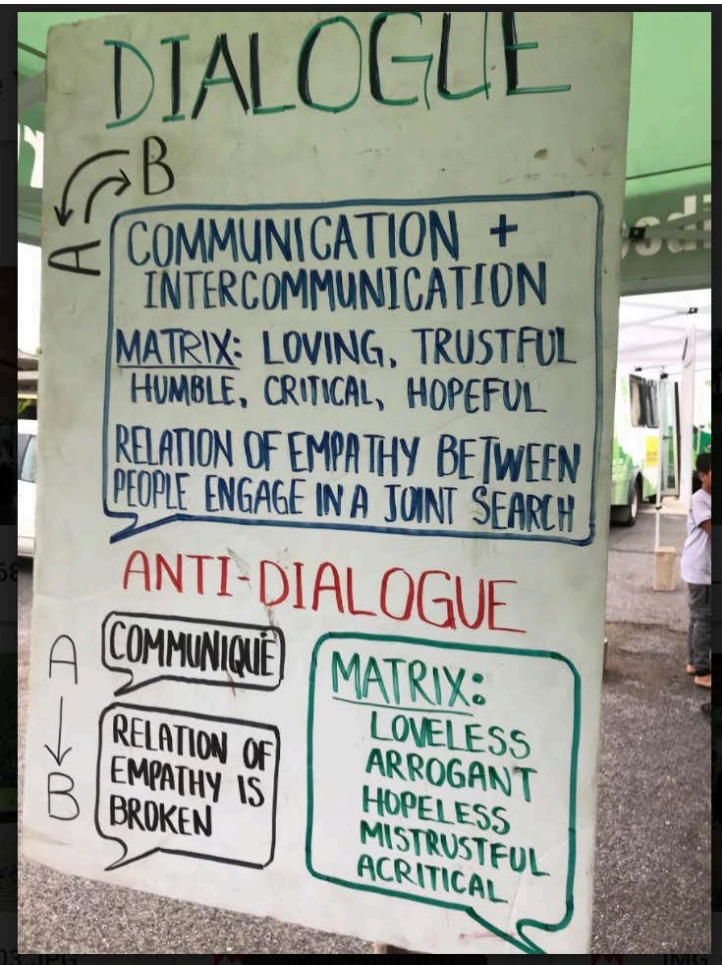
# Waimanalo Site Visit 2/23



# 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?







# 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





# Collaborative Consulting

*Where Ideas Evolve Into Action*



**Lori Peterson**

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

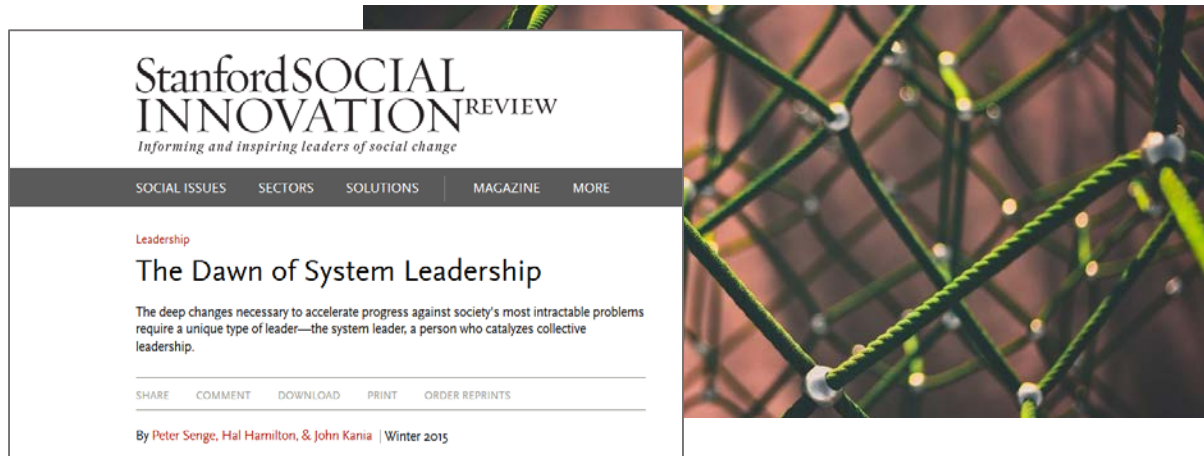


**Jessica Oster**

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

## Entities

Organizations  
Roles  
Contributions

## Financing

Funding Mechanism  
Start-up and Long  
Term  
Resource needs

## Operations

Integrated Org Chart  
Process and Systems  
Data and Info  
Sharing

## Leadership

Oversight  
Decision-Making  
Style

## Performance

Goals/Objectives  
Monitoring Process  
Data Collection

## Future

Sustainability  
Growth/Expansion  
Spread





# Health Leads



**Therese  
Wetterman**  
Director, Learning  
Network



**Andrea LeBeouf**  
Program Director,  
Southern  
California



**Mary Carl**  
Principal, West  
Coast Partnerships



**Lea Tompsett**  
Principal,  
Transformative  
Impact

# 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







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Project Open Hand™  
meals with love

# 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
3. **Nonprofit Finance Fund**: National Findings: Current Partnership Efforts & Best Practices



**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



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# Partnership Agreements (March 18)

- If you have an agreement in place, send to Diana ([diana@careinnovations.org](mailto: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](http://www.careinnovations.org/roots-portal)

STAY UP-TO-DATE!  
**ROOTS Program Portal**

OVERVIEW PROGRAM DOCUMENTS SDOH RESOURCES WEBINARS & CONVENINGS COMMUNITY

HELLO, ROOTS TEAMS!  
Welcome to our new team portal page! This is where you'll find general program information, including upcoming opportunities, important dates, and program resources.  
For more information about ROOTS, please visit the [program page](#).  
Have thoughts on how we can improve this portal page?  
[Give Us Feedback!](#)

**Newsletters**  
Newsletters are emailed out biweekly on Mondays, and contain program updates, resources and reminders about upcoming opportunities.

**Previous Newsletters**

January 2018	Sent January 8, 2017
December 2017	Sent December 18, 2017
December 2017	Sent December 5, 2017
November 2017	Sent November 20, 2017
November 2017	Sent November 7, 2017
October 2017	Sent October 12, 2017
September 2017	Sent September 27, 2017
September 2017	Sent September 20, 2017



# Thank you!

*For questions contact:*

**Megan O'Brien**  
**Value-Based Care Program Manager**  
Center for Care Innovations  
[mobrien@careinnovations.org](mailto:mobrien@careinnovations.org)

**Diana Nguyen**  
**Program Coordinator**  
Center for Care Innovations  
[diana@careinnovations.org](mailto:diana@careinnovations.org)