ROOTS Webinar
February 8, 2018
Change Management, Engagement, & Partnerships
Sneak Peek Webinar: What's in Store for March 8th
Our Program Team

Megan O’Brien
Veenu Aulakh
Diana Nguyen
Webinar Reminders

1. Everyone is muted.
   • Press *6 to mute yourself and *7 to unmute.

2. Remember to chat in questions!

3. Webinar is being recorded and will be posted on ROOTS Portal and sent out via the next newsletter.
Today’s Agenda

1. Program Updates
2. March 8th Session Logistics
3. Sneak Peek into content
   1. Health Leads
   2. Collaborative Consulting
   3. Nonprofit Finance Fund
4. Q&A
Program Updates
Roots Clinic Site Visit 1/31
Highlights

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

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

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

• **Integration mindset**, not a finance model

• "Never get ahead if we don't move more upstream...but **we don't want to do it all ourselves**"
SIREN Webinar 2/27 @ 9am: Food Insecurity

• Findings from SIREN’s systematic review on health care-based screening for food insecurity.
• Will highlight the validity of various screening tools, evidence on implementation strategies, and patient acceptability of food screening.
• Speakers:
  • Caroline Fichtenberg, PhD, SIREN Managing Director
  • Emilia De Marchis, MD, UCSF
  • Jacqueline Torres, PhD, UCSF
  • Deepak Palakshappa, MD, MSHP, Wake Forest School of Medicine

Register at: https://cc.readytalk.com/registration/#/?meeting=ox0uoi365k6s&campaign=3iambvnve1vm
March 8th Planning Updates
March 8 Session & Draft Agenda

When/Where:
• Thursday, March 8, 2018 from 9:00am-4:30pm
• Downtown Los Angeles @ the Millwick
• You should bring 4 teams members

9:00am – 9:30: Breakfast & Registration
9:30 – 10:00: Welcome & Overview
10:00 – 10:45: Potential Speaker
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 – 4:15: Themed Breakouts
4:15 – 4:30pm: Evaluation, & Closing
# Partnership Questions

<table>
<thead>
<tr>
<th><strong>SHARING DATA:</strong></th>
<th>How do you best share data and resources with community partners?</th>
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<tbody>
<tr>
<td><strong>ALIGNMENT:</strong></td>
<td>How do you make sure that missions and goal are aligned between partners?</td>
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<tr>
<td><strong>AGREEMENTS:</strong></td>
<td>Do you use formal or informal agreements when establishing partnerships?</td>
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<td><strong>ROADMAP:</strong></td>
<td>Is there a roadmap or toolkit for developing and sustaining partnerships?</td>
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<td><strong>ASSESSMENT:</strong></td>
<td>How do you assess community partners to ensure a good fit?</td>
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<tr>
<td><strong>ENGAGEMENT STRATEGIES:</strong></td>
<td>What are strategies for engaging upstream community partners?</td>
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<tr>
<td><strong>MODELS:</strong></td>
<td>What are innovative partnership models?</td>
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Core Faculty

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

**For March 8:**
- Change Management
- Engagement & Buy-in

[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:**
- Spectrum of Collaboration
- Systemic Leadership

[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

Asks

- Register your team in EventBrite by February 23

- If you are registered, Diana will send a FUP email to ask:
  1. If you are planning on driving
  2. What sessions you are most interested in attending

- One person per team participate in 30 minute interview with Collaborative Consulting

- Come to March 8th session with:
  1. One **challenge** related to engagement & partnerships
  2. One **success** related to engagement & partnerships
Questions?
Changing What Counts as Health Care

Addressing Patients’ Social Needs at Scale

ROOTS Content Webinar
February 8, 2018
Our Team

Therese Wetterman
Director, Learning Network, Health Leads

Andrea LeBeouf
Program Director, Southern California, Health Leads

Artair Rogers
Manager of West Coast Partnerships, Health Leads

(c) 2017 Flynn Larsen. Photo Courtesy of the Robert Wood Johnson Foundation
We envision a healthcare system that addresses all patients’ **basic resource needs** as a **standard** part of quality care.

Our Vision
Health Leads...

...is a non-profit organization that has implemented essential needs interventions in hospitals and clinics for more than 20 years.

...helps hospitals, clinics and their communities build partnerships that connect patients to the essential resources they need to be healthy – from food, to transportation, to healthcare benefits.
Health Leads...

...enables health systems to build high-impact, cost-effective interventions with solutions, services, technology and training.

...broadly advocates to change our healthcare system to address not just medical services, but also the essential resources patients need to be healthy.
From Doing...to Teaching...to Enabling
Our Solutions

20+ years of empowering healthcare organizations to integrate social needs into care delivery with learning, consulting and technology solutions:

**Design**
Create your social needs strategy through our interactive workshops or hands-on coaching

**Implement**
Integrate social needs into care delivery and improve over time with our Implementation Services

**Enable**
Manage patients and track success using our Reach social needs technology
Core Elements of Social Needs Integration

**Patient Identification & Screening**
Which patient population will you target and how will you surface their social needs?

**Navigation & Resource Connections**
For which specific social needs will you offer support? What level and type of support?

**Community Partnerships**
What Community Based Organizations are critical to the health of your members? How will you continually improve access to resources?

**Social Health Needs Team & Workflow**
Who will provide resource support for patients? How will this integrate with broader clinical/behavioral processes?

**Data and Evaluation**
How will you know how much to invest in social supports in the long run? How will you know how to maximize the impact of this investment?

**Leadership and Change Management**
Have you identified a social needs champion with the ability to allocate resources?
What to expect on March 8th

Session 1: Change Management Strategies to Support SDOH Interventions

Goal: Participants learn how Health Leads’ partner organizations have navigated change management issues as they adopted SDOH interventions in the practice setting

This session will include:
1) Interactive and reflective activities
2) Overview of Health Leads’ framework for social needs integration
3) Case studies of Health Leads’ partners

Session 2: Practical Application of Change Management Principles

Goal: Participants come away with clear, actionable steps for addressing change management issues to support the success of their SDOH interventions

This session will include:
1) Guided work to apply best practices for managing change to your unique situation
2) Feedback from Health Leads experts
3) Opportunities to discuss and share ideas across organizations
Resources

White papers, webinars, and our Screening Toolkit can be found on our website:

https://healthleadsusa.org/solutions/tools/

We look forward to seeing you on March 8th!
Project Team

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

Jessica Oster
Leadership Coaching Change Management

Erin Lockwood
Network and Partnership Development, Market Research
Our Focus

Multi-Stakeholder Collaborative Design

Cross-Sector Partnership Development

Capacity Building and Leadership Development

Change Activation and Management
Recent Cross-Sector Partnership Work

- **Foundations** investing in capacity building to position CBOs to partner with healthcare providers and payers to improve health outcomes by addressing the social risks

- **CBOs** repurposing their service models to strengthen their ability to partner with healthcare entities, achieving greater impact and sustainability

- **Health System** seeking to integrate medical and social care providers to address issues related to housing, nutrition, and care management by developing a network of CBOs ready to contract with healthcare entities for these services

- **Four Hospitals** testing the effectiveness of a social determinant screening tool and referral process in partnership with local CBOs

- **Hospital** seeking optimal performance by developing a community care network that better integrates providers to meet all care needs of individuals
Partnership as a Means Not an End

A hospital partnered with a CBO on a short-term respite program to achieve:

- 85% Readmission Reduction for Respite Participants
- Serving over 200 Homeless Patients Annually
- 2 Week Reduction in Average Length of Stay for Participants
- Working to expand the program capacity and introduce new partners

A health plan engaged a CBO and housing provider to create a community care settings program achieving:

- 50% Reduction in Total Cost of Care per Member per Month
- 60% Reduction in Hospital Average Length of Stay
- 95% Retention Rate in Community Placement at 6 Months
- Working to add hospitals as partners and enter new markets

A community-wide alliance developed to integrate their care and referral process:

- 8% Readmission Reduction for Home Health Discharges
- Recipient of funds to pilot new person-centered care models
- Developed seamless integrations between providers and sectors
- Working to increase CBO involvement and better track outcomes
Learning that will inform March Session

**Leadership** (influence, power, relationship capital, systems awareness)

Financing Mechanism (beyond the grant)

**Partnership / Collaborative Design** (integrated structure)

Partnership Selection

Capacity needed across sectors & together

Results
March 8th: 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
Possible Tools

1. System mapping
2. Peer shadowing
3. Relentless pursuit of two questions
   a) What do we want to create?
   b) What exists today?

Use the gap between the two to generate energy and focus
## March 8\textsuperscript{th}: Partnership Design

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<tr>
<th>Entities</th>
<th>Financing</th>
<th>Operations</th>
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<tr>
<td>Organizations</td>
<td>Funding Mechanism</td>
<td>Integrated Org Chart</td>
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<td>Roles</td>
<td>Start-up and Long Term</td>
<td>Process and Systems</td>
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<td>Contributions</td>
<td>Resource needs</td>
<td>Data and Info</td>
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<td>Leadership</td>
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<td>Sustainability</td>
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<td>Oversight</td>
<td>Performance</td>
<td>Growth/Expansion</td>
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<td>Decision-Making Style</td>
<td>Goals/Objectives</td>
<td>Spread</td>
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<td>Monitoring Process</td>
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<td>Data Collection</td>
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### Additional Tools

#### C3O Toolkit: Value Proposition Activity

**Objective:**
- Value Proposition

**Tasks:**
- Develop a value proposition
- Test and refine the value proposition

**Key Elements:**
- Proposition
- Evidence
- Evidence

**Outcome:**
- Refine the value proposition

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#### Management Capacity

**Domain:** Management Capacity

<table>
<thead>
<tr>
<th>Domain</th>
<th>Sub-Objectives</th>
<th>Task</th>
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<tbody>
<tr>
<td>MC 1.</td>
<td>Demonstrate ongoing assessment</td>
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<tr>
<td>MC 2.</td>
<td>Enhance communication</td>
<td></td>
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<tr>
<td>MC 3.</td>
<td>Demonstrate continued focus on recruitment and employee development</td>
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#### Organization Name

- **Strategy:**
  - Understand the healthcare market
  - Enhance the competitor
  - Institute business development strategies

- **Goals:**
  - Understand the current cost of care delivery and the related revenue
  - Identify the various companies and develop a market plan

- **Objectives:**
  - Develop the various business development strategies
  - Institute business development strategies

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#### Refining Your Strategic Conversation

Use the clauses below to develop and refine the key aspects of your organization’s strategic conversation for your selected target audience (client / partner):

1. **What is the purpose of the conversation?**
2. **Who is the audience?**
3. **What is the final action to be addressed by the conversation?**
4. **What is the message to be conveyed?**
5. **What is the basis / main message of the conversation?**
6. **How will the message be reinforced or publicized?**
7. **Audit / Identify / Prepare for the conversation (marketing tools, timelines, and responsible individuals).**
Resources (or some pre-reading?)

- The Dawn of Systems Leadership
- The SCAN Foundation Linkage Lab 1 Case Studies
- The SCAN Foundation Linkage Lab 2 Case Studies
- The SCAN Foundation Innovation In Health Care Award Case Summaries
- 20/20 Foresight
- The Community Cure for Health Care
- Why the Healthcare Sector Needs Systems Leaders
- Multi-Sector Partnerships Have the Potential to Transform Health, But Most Aren’t There Yet
- Multi-Sector Partnerships Need Further Development to Fulfill Aspirations for Transforming Regional Health and Well-Being
- Beyond Health Care: The Role of Social Determinants in Promoting Health and Health Equity
- Creating a “Wellness Pathway” Between Health Care Providers and Community-Based Organizations to Improve the Health of Older Adults
- Defining the Health Care System’s Role in Addressing Social Determinants and Population Health
- Health Care That Targets Unmet Social Needs
- Integrating Medical and Social Services: A Pressing Priority for Health Systems and Payers
- Why Big Health Systems Are Investing in Community Health
- The Social Determinants of Health Are More Than Just Poverty
- The Rise of the Anchor Institution: Setting Standards for Success
- Committed Leadership Trumps Healthcare Uncertainty
See You Soon!

866-332-3923
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Our Team

Alexandra Chan
Associate Director, Advisory Services

Annie Chang
Manager, Advisory Services
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 SDOH

• 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
What to Expect on March 8th

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


• 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
Resources/Tools

- **Partnership Assessment Tool for Health (PATH)**

- **Working Together Toward Better Health Outcomes Report**
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Thank you!

For questions contact:

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