

# Welcome!

This webinar is being recorded and will be posted on iLab-HQ.


If you are listening via phone, please connect your audio to the Zoom platform by pressing **#[2-digit number in top left corner of Zoom window] #**

Everyone is muted. **Press \*6** when you want to unmute yourself.

Please keep your webcam on while you're speaking if you have one.



iLab



# Innovation Lab: Whole Health

Welcome Meeting  
January 18, 2018



iLab



CCI  
CENTER FOR CARE  
INNOVATIONS

blue  of california  
foundation

Blue Shield of California Foundation is an Independent Licensee of the Blue Shield Association

# Agenda

- **Program Overview (5 mins)**
- **Program Outline & Activities (10 mins)**
- **CCI Intros (3 mins)**
- **iLab Project Team Intros (30 mins)**
- **Innovation Experts Intros (30 mins)**
- **Action Items (2 mins)**
- **Discussion (10 mins)**

A woman with long dark hair, wearing a black top, stands on the left side of the frame, looking towards a whiteboard. A man with dark hair, wearing a dark jacket, stands on the right side, also looking at the whiteboard. The whiteboard is covered with numerous colorful sticky notes and a few handwritten notes. The background is a plain, light-colored wall. The text 'Program Overview' is overlaid in the center of the image.

# Program Overview

FIAE We

Shine

# Why did we create Innovation Lab: Whole Health?

We recognize that critical issues surrounding health will not be solved by traditional healthcare solutions.

We need to find new partnerships and new approaches to addressing overall health and wellbeing.

We hope to learn how we might promote sustainable, new innovations and ideas addressing underserved communities' barriers to good health.

# What do we hope to accomplish in iLab?

We created a learning lab to provide communities the space to test bold ideas to address the social determinants of health.

In iLab, your project teams bring ideas to life and monitor what happens so we can all better understand what works and doesn't work.

CCI is also eager to learn from you what ideas are worth spreading, and what kinds of impact are achievable in ten months.

# How do we meet our goals together?

## CCI Programming Role

**\$50,000 in seed funding to foster action, commitment, and support project activities.**

**1:1 support from experts in business, design, storytelling, evaluation, legal, IT.**

**Identify needs across project teams and develop responsive programming in real time.**

**Create venues and channels through which to tell your disseminate your stories.**

## Project Team Role

**Seek diverse stakeholder input to refine your idea.**

**Develop a measurement plan that provides sufficient evidence to inform the fate of the project in 2019.**

**Iteratively prototype and gather feedback on your project from stakeholders, modifying the design regularly as you go.**

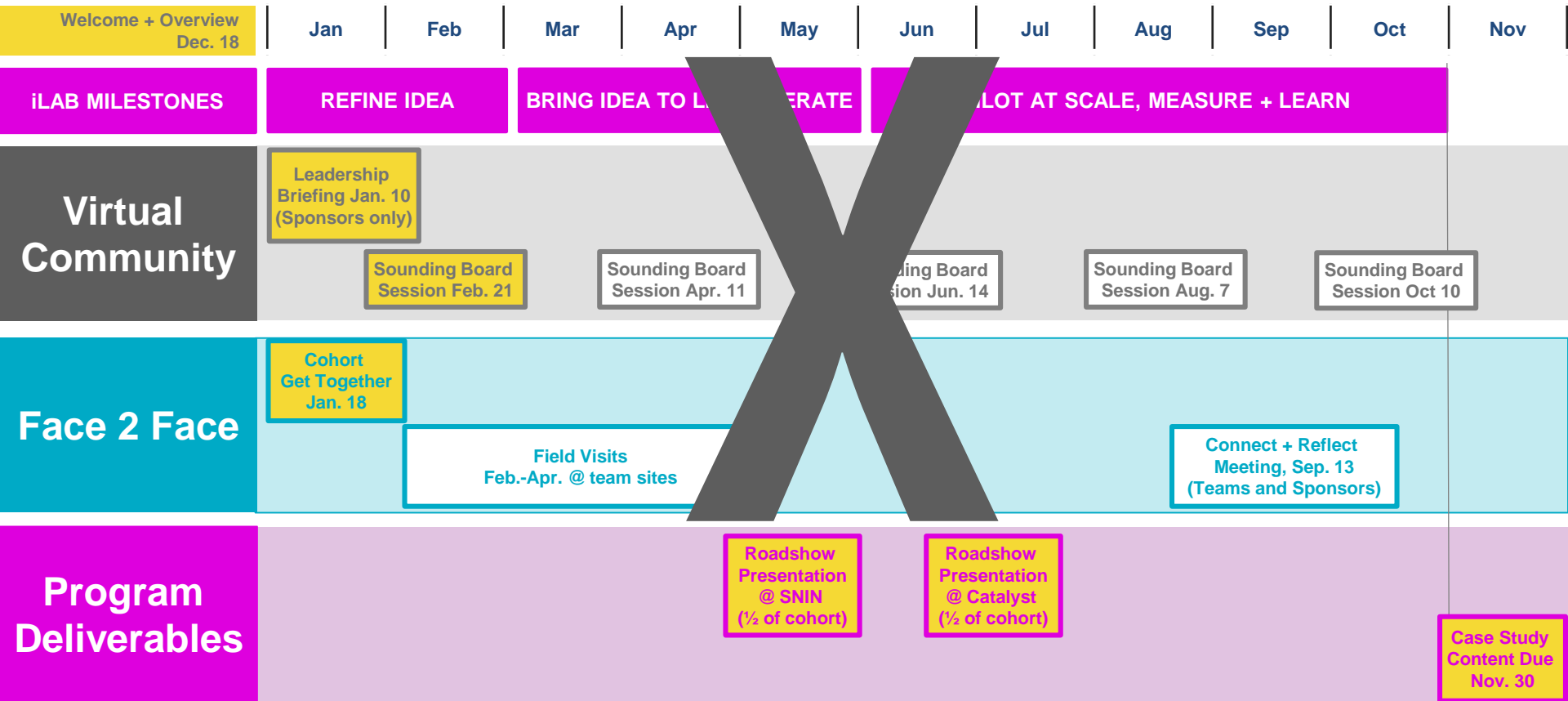
**Document your process in photo, video, quotes, and other media to develop a case study.**

A woman with long dark hair, wearing a black top, is on the left, looking at a whiteboard. A man with dark hair, wearing a black jacket, is on the right, also looking at the whiteboard. The whiteboard is covered with various sticky notes, diagrams, and handwritten text. The text on the whiteboard includes "FAE", "We", "Share", and "7". There are also several small diagrams and icons on the board, including one that looks like a person sitting at a desk. The background is a plain white wall.

# Program Outline & Activities



# Old Timeline (forget this!)



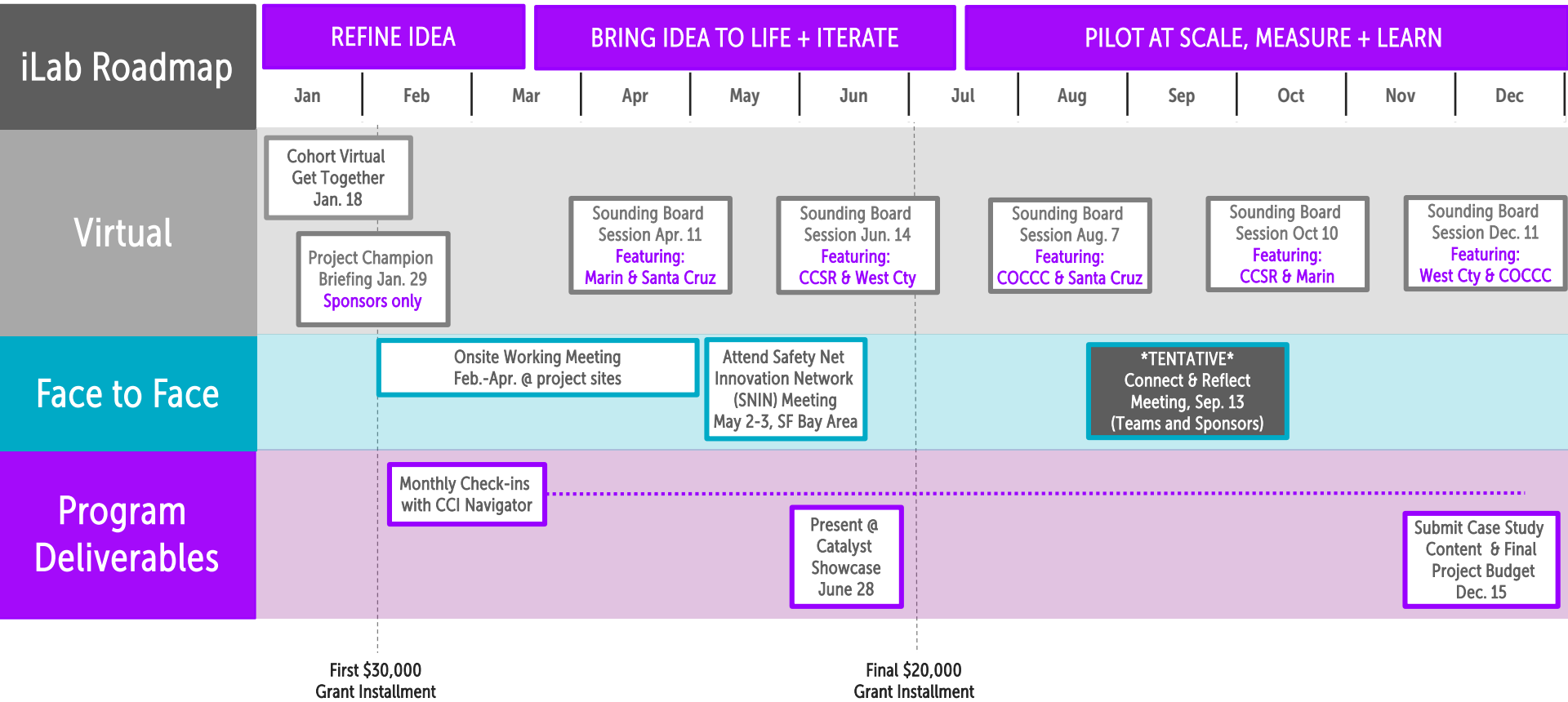
Project sponsors expected to attend January call and September meeting.  
 Each team shares project for input from cohort at one Sounding Board session.  
 Each team presents at one Roadshow event.

End of Programming



# Current Timeline

- \*Project sponsors attend 1/27 call and (tentative) 9/13 meeting.
- \*Each team shares seeks input on project from cohort at two Sounding Board sessions.
- \*Each team presents at 6/28 Catalyst Showcase.
- \*Additional optional workshops/trainings may be offered if we identify a collective needs.



# Program Glossary

Project Champion Briefing	One-time call with project sponsors to share high level information about the program, answer questions
CCI Navigator Check-in	Regular call between team and navigator to provide thought partnership and facilitate connections to resources
Onsite Working Meeting	CCI (and experts, if requested) come to your project site for ~3 hours to problem solve and identify ways we can better support you
Sounding Board Sessions	Two teams seek fresh perspective from peers on their projects. This is not a report out or status update!
Safety Net Innovation Network	Teams invited to join our semi-annual innovation meeting in Bay Area (travel expenses reimbursed)
Catalyst Showcase Presentation	Teams present their projects and progress to participants in our innovation & design thinking training program (Oakland)
Connect and Reflect Meeting	Tentative date held for teams to convene for skill building and reflection
Case Study Content	Teams develop copy and provide media to complete a website case study, including photos, videos, quotes from their activities



# Case Study Example



## Profile

Community Health Center Network (CHCN) is a nonprofit managed services organization made up of 8 federally qualified health center organizations in medically-underserved communities throughout Alameda County, CA and surrounding counties.

<b>Organization</b>	Community Health Center Network (CHCN)
<b>Issue</b>	Addressing social, medical and behavioral health care needs of high-risk patients to reduce high costs and utilization of hospitals and emergency departments.
<b>Technology Solution Tested:</b>	Welkin Health case management platform as part of Care Neighborhood Program
<b>Stage</b>	Implemented at all 8 health center organizations with 12 Community Health Worker (CHW) positions
<b>Financial Investment:</b>	\$ (Welkin technology platform)
<b>Partners:</b>	Alameda Alliance for Health, Anthem Blue Cross

"My experience with Care Neighborhood has been very impressive. My case manager empowered me to take on a more active role in my rehabilitation. She allowed me to realize the importance of taking charge of my own health, while at the same time, offering guidance in avenues where I may need some extra support."

Care Neighborhood Member



### Heart of the Model: Person-centered approach to building CHW capacity

CHWs come from the communities served by member health center organizations who build trusting relationships with patients and receive training and ongoing mentorship support from CHCN.

- Care is delivered by 1-2 CHWs based at each health center organization who are integrated into the medical home team (senior leader champion, social worker, and nurse)
- Patient-centered CHW curriculum developed by CHCN - motivational interviewing, trauma-informed care, structural competency, cultural humility, care plan and shared action plan
- Weekly Buzz all-CHW meetings - training component on various medical topics, available community resources, and case review

## Key Challenges



Limited impact of traditional, plan-based telephonic case management; stronger patient relationships were established within the health center



Trauma and lack of access to services to address other social determinants of health for safety net population



Many of CHCN member health center organizations did not have dedicated resources for case management; resources are scarce and ever-changing



Care Neighborhood dashboard prototype in Excel with SQL backend. (We not able to deployment across multiple sites)



Welkin - current patient panel dashboard for Care Neighborhood. Customized case management platform that integrates data from multiple sources including EHR.

## A Scalable Solution

Care Neighborhood, a program in which community health workers (CHW) reach out to those most at risk, is their solution to this problem. CHCN developed a prototype case management tool to drive CHW workflow.

Care Neighborhood's case management system was originally an Excel spreadsheet that was tied to CHCN's central data warehouse and implemented with one health center care team to manage a high risk member panel. Looking to scale this across all 8 health center sites, CHCN transitioned to Welkin, a modular patient relationship management platform, to enhance and streamline CHW workflow. In addition to Welkin, CHCN uses a data visualization and analysis tool called Tableau to turn data from Welkin into insights and demonstrate impact in real-time.

CHCN uses a selection algorithm to identify patients at high risk of hospitalization. However, claims data may not tell the whole story. Primary care providers (PCPs) and clinics staff know their patients very well and understand when there is a need for additional support. CHCN developed Case Management Criteria for PCPs, CHWs, and other clinic staff to determine a patient's candidacy for Care Neighborhood. Generally, a patient is a good fit if they demonstrate high utilization (at least one inpatient admission in last 12 months) or is highly likely to be admitted in the next 30-60 days.

## Key Tools & Resources

### TECHNOLOGY SOLUTIONS

**Protected: Care Neighborhood: Community Health Worker (CHW) Training Checklist**

DEC 4, 2004 • CENTER FOR CARE INNOVATIONS

Key knowledge, processes, and skills required of all Care Neighborhood CHWs

### TECHNOLOGY SOLUTIONS

**Protected: Care Neighborhood: Transportation Support Protocol**

DEC 4, 2004 • CENTER FOR CARE INNOVATIONS

Protocol for enabling patients to get to urgent medical and mental health appointments

### TECHNOLOGY SOLUTIONS

**Protected: Care Neighborhood: Legal Aid Referral Workflow**

DEC 4, 2004 • CENTER FOR CARE INNOVATIONS

Workflow for warm hand-off between Bay Area Legal Aid and CHWs to provide legal assistance to Care Neighborhood patients

Initial pilots have shown improvements across several measures with positive feedback from providers and members. Care Neighborhood participatory group compared to control group (pre and post) showed:

43%

Fewer inpatient admissions

21%

Reduction in ER visits

32%

Increase in PCP visits



# www.careinnovations.org/iLab-HQ

CCI  
CENTER FOR CARE  
INNOVATIONS

Population Health  
Data Analytics  
Innovation & Design Thinking

Technology Solutions  
Delivery System Reform  
Community-Centered Care

ABOUT PROGRAMS GET INVOLVED Q

The Resource Center

STAY UP-TO-DATE!  
**Innovation Lab HQ**

OVERVIEW PROGRAM UPDATES THE CREW RESOURCES

HELLO. ILAB TEAMS!

Welcome to our new team page! This is where you'll find general program information including upcoming opportunities, important dates and program resources.

For general information about the Innovation Lab, please visit the [program page](#).

Have thoughts on how we can improve the portal page?

Give Us Feedback!

- Program References
- Latest Updates
- Connections to Support Team
- CCI Innovation Resource Library

A woman in a blue shirt is pointing at a laptop screen. Another woman is looking at the screen. The laptop screen displays a document with the following text:

1. All  
2. 1/1/14  
3. 1/1/14  
4. 1/1/14

1. All  
2. 1/1/14  
3. 1/1/14  
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1. All  
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# CCI Support Team Intros

# Your iLab Program Organizers & Resource Navigators



**Diana Nguyen (she/her)**  
**Program Coordinator**



**Laura Blumenthal (she/her)**  
**Program Manager & Navigator**  
~ Catholic Charities of SR ~  
~ COCCC ~



**Veenu Aulakh (she/her)**  
**Program Director & Navigator**  
~ West County Health Centers ~



**Jenny Wright (she/her)**  
**CCI Navigator**  
~ Marin City Health & Wellness ~



**Alexis Wielunski (she/her)**  
**CCI Co-Navigator**  
~ Santa Cruz Health Center ~



**SA Kushinka (she/her)**  
**CCI Co-Navigator**  
~ Santa Cruz Health Center ~

# Your Innovation Expert Support Team



Go to “The Crew” page at  
[careinnovations.org/iLab-hq](https://careinnovations.org/iLab-hq)



**Trish Price** (she/her)  
HumanSights  
*The Design & Storytelling Guru*



**MaryKate Scott** (she/her)  
Scott & Company  
*The Business Maven*



**Seth Emont** (he/him)  
White Mountain Research  
*The Data Master*



**Ray Pedden** (he/him)  
CCI  
*The IT Handyman & Legal Liaison*



# Who do I contact for what?



Program Logistics and  
Events/Activities  
Deliverables



iLab Organizers  
Diana & Laura



Check-ins, updating  
CCI about your progress



Resource Navigators  
Laura/Alexis-SA/Jenny/Veenu



Advice on business model  
development, design,  
legal, IT, evaluation



Expert Innovation Support  
Trish/MaryKate/Ray/Seth

A group of four people are gathered around a large conference table in a meeting room. They are all looking at documents and papers spread across the table. One woman on the left is smiling and looking towards the others. A man on the right is looking down at a document. In the background, there are large windows with blinds and a whiteboard. The room is brightly lit, and the atmosphere appears to be collaborative and professional.

# iLab Project Team Intros

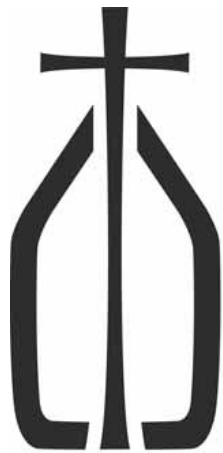


## ~5 minute Intros

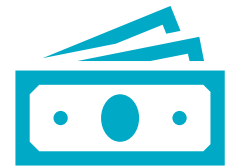
1. Organization(s)
2. Location(s)
3. Source of community pride
4. Project team members & roles
5. Project idea
6. What's on your mind?

# Catholic Charities of Santa Rosa

1. Organization(s)
2. Location(s)
3. Landmark
4. Project team
5. Project idea
6. What's top of mind



**Catholic Charities**  
*of the Diocese of Santa Rosa*



# Coalition of Orange County Community Clinics

1. Organization(s)
2. Location(s)
3. Landmark
4. Project team
5. Project idea
6. What's top of mind



**WHAT PEOPLE THINK ORANGE COUNTY IS**



**WHAT ORANGE COUNTY REALLY IS**



# Santa Cruz Community Health Center

1. Organization(s)
2. Location(s)
3. Landmark
4. Project team
5. Project idea
6. What's top of mind?



# Marin City Health & Wellness Center



1. Organization(s)
2. Location(s)
3. Landmark
4. Project team
5. Project idea
6. What's top of mind




# West County Health Centers

THE LOVE IN THE AIR  
IS THICKER  
THAN THE SMOKE

1. Organization(s)
2. Location(s)
3. Landmark
4. Project team
5. Project idea
6. What's top of mind





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# Innovation Expert Support Team **Intros**

FAE Who

Shane

# Meet Trish Price: The Design & Storytelling Guru



More about me:

[LinkedIn](#)

Find a time to call me here:

<https://calendly.com/trishaconnect>

If you have background information on your project, please email it to me after you've scheduled a calendar appointment and before we chat.

[Trishaconnect@gmail.com](mailto:Trishaconnect@gmail.com)

I have over 20 years of experience designing, advising, coaching, and leading teams in creating better, more human experiences.

I enjoy creating thoughtful solutions with my clients and am driven by curiosity and a desire to bring creative ideas into being. My skills include bringing people together for a common cause and guiding collaborative efforts into tangible results.

## I'm an expert in:

- Human-centered design / design thinking
- Facilitation and co-design
- Moving from innovating to operationalizing
- Framing opportunities and visualizing solutions

## I've worked for:

- IDEO & IDEO.org
- Kaiser Permanente's Garfield Healthcare Innovation Center and Care Management Institute
- Adaptive Path

## I have training in:

- Interactive media and animation
- Video ethnography
- Psychology and Hispanic studies

# Meet MaryKate Scott: The Business Maven



More about me:

[LinkedIn](#)

Find a time to call me here:

<https://calendly.com/marykatescott/cci-hubs-business-coaching>

If you have background information on your project, please email it to me after you've scheduled a calendar appointment and before we chat.

[marykate@marykatescott.com](mailto:marykate@marykatescott.com)

I am a management consultant and coach for business planning and business sustainability solutions. I work in the public and private healthcare sectors with health center leaders, and investors focusing on the safety net space. I've worked on operational redesign, software, medical devices, pharmaceuticals, pharmacy, labs and across several therapeutic areas (cardiology, dermatology, radiology, orthopedic, maternity, among others) . I have worked with many California FQHCs as well as health systems that integrate with the safety net system.

You can expect me to join our calls by video.

## I'm an expert in:

- Business model and business plan development
- Strategy and sustainability planning
- Making the business case for your project and demonstrating ROI
- Telling the business story of your project

## I've worked for:

- Many healthcare systems, health centers and companies (digital, technology, pharma, device)
- Foundations: CHCF, Pew, Kellogg, Arcora, others
- McKinsey & Company
- Procter & Gamble

## I have training in:

- Business strategy
- Management consulting
- Investment diligence
- Market research
- Business storytelling

# Meet Seth Emont: **The Data Master**



More about me:

[LinkedIn](#)

Find a time to call me here:

[https://calendly.com/sethemont\\_evalcoach](https://calendly.com/sethemont_evalcoach)

If you have background information on your project, please email it to me after you've scheduled a calendar appointment and before we chat.

[sethemont@outlook.com](mailto:sethemont@outlook.com)

I have provided research and evaluation technical assistance for a number of national and statewide initiatives in the following areas: innovation in health care delivery, clinical care delivery and efficiency, quality improvement, social networks, human capital and leadership development, chronic disease management, patient- and family-centered care, childhood obesity policy (healthy eating and physical activity), end-of-life care, tobacco control, substance use, and eHealth.

## I'm an expert in:

- Quantitative/qualitative research and evaluation
- Survey design and sampling
- Metrics development and tracking
- Data analysis and interpretation

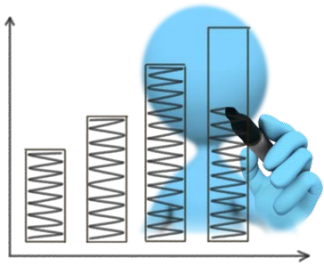
## I've worked for:

- Robert Wood Johnson Foundation
- U.S. Centers for Disease Control
- Christiana Care Health System
- Johnson & Johnson Health Care Systems
- Indiana State Dept. of Health

## I have training in:

- Epidemiology
- Public Health
- Psychology

# Evaluation. Coaching. Support.



Work with you to develop and track a set of early indicators to help you refine your idea

Based on early indicators, develop a set of longer-term measures to track the impact of your pilot (and beyond)

Help you develop questions and a plan to gather feedback from staff / providers / patients (if needed)

Review data with you and provide any assistance you need along the way

*On a case-by-case basis and with CCI staff approval...*

Help you with data analysis of de-identified data set and summarize findings

# Meet Ray Pedden: The IT Handyman + Legal Liaison



More about me:

[LinkedIn](#)

Find a time to call me here:

<https://calendly.com/rap>

If you have background information on your project, please email it to me after you've scheduled a calendar appointment and before we chat.

[ray@careinnovations.org](mailto:ray@careinnovations.org)

I am a longtime partner of CCI's with over 25 years of senior healthcare management experience. I have operational management experience with academic and multi-specialty group practices, in developing physician-hospital joint venture organizations, information systems strategy and implementation, managed care, business operations, clinic operations and developing multi-specialty group practices.

Call me when you need legal advice, and I'll connect you to the big guns: our pro bono counsel at [Ropes & Gray](#).

## I'm an expert in:

- Contract development and negotiation with vendors
- Co-development of technology interfaces
- Healthcare information systems
- Legal advice (through Ropes & Gray)

## I've worked for:

- Stanford University
- Cornerstone Research
- Heuristic Technologies
- Heuristic Associates

## I have training in:

- Medicine
- Engineering
- Business administration

**Action Items**



**Before March 1**

# Action Items



## CCI To Do's:

**By 1/22:** We will reach out to your team to schedule a 30-minute recurring meeting between you and your CCI navigator.

We recommend teams start with monthly meetings; these may become less frequent over time.

## Project Team To Do's:

**Today:** Bookmark [careinnovations.org/ilab-hq](https://careinnovations.org/ilab-hq)

**By 1/26:**

- Respond to CCI's email with for CCI Navigator check-in.
- Pick potential dates [here](#) for a three-hour visit to the project site with CCI and TA advisor(s).

**By 2/15:** Schedule and hold a one hour meeting with Seth to work on a measurement plan.

**By 2/28:** Share a one-page project timeline with CCI ([see template](#))

**By 3/1:** Share a draft measurement plan with Seth and CCI.



# Thank You!

[Diana@careinnovations.org](mailto:Diana@careinnovations.org)

[Laura@careinnovations.org](mailto:Laura@careinnovations.org)



iLab

introduce  
- to menu  
f svcs  
ailable  
you  
line

Create  
track  
have a  
for decap

WEEKLY RANGES/  
Huddles  
comp leg  
highlighting  
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EHR checklist  
For  
touches  
pick  
list



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