

# Building a Foundation for Cross-Sector Integration to Advance Patient and Population Health



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# **SYSTEMS** **INTEGRATION**

A community project at United Way

## **Practicing Shared Accountability: Monroe County Systems Integration Project**

April 26, 2019

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# A Presentation on “How”

- **Context**
- **4 Keys to Success**
  - Process
  - Participation
  - Transparency
  - Trust
- **7 Tools**
  - Collective Vision
  - Theory of Change
  - Stakeholder Mapping
  - Design Goals
  - Co-Creating Culture and Decision Making
  - Resource Development
  - Business Requirement Interviews







Comparable Size (+/-) Population of Rochester)			
Extreme Poverty			
Rate	Rank	City	Rate
16.1%	1	Rochester	16.1%
15.7%	2	Buffalo	15.1%
15.4%	3	Richmond	13.9%
15.0%	4	Hartford	13.6%
15.0%	5	Fresno	13.4%
15.0%	6	New Orleans	12.6%
15.3%	7	Birmingham	12.6%
15.7%	8	Tucson	11.3%
15.2%	9	Worcester	10.5%
15.2%	Mid-Point →		10.4%
15.0%	10	Grand Rapids	10.3%
15.0%	11	Bridgeport	9.8%
15.0%	12	Tulsa	9.1%
15.5%	13	Salt Lake City	8.7%
15.5%	14	Bakersfield	8.5%

[illegible]







# IBM Smarter Cities Challenge: Rochester, NY

## Misaligned Services and Programs

- Lack 360-degree view of person in need
- Reliance on manual processes
- Inconsistent eligibility rules

## Reactive, transactional service delivery with little focus on proactive and preventive actions

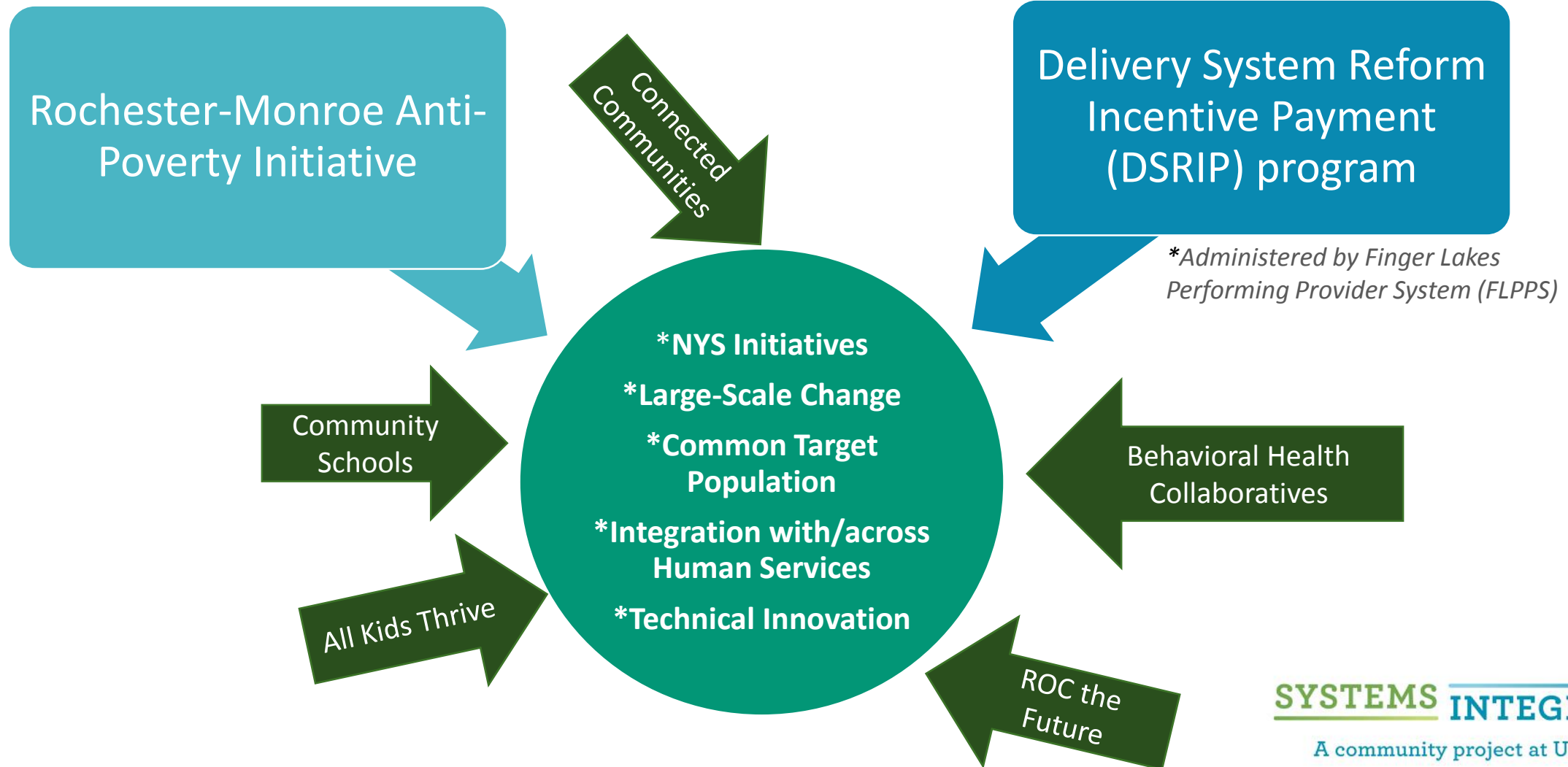
## Lack of person-centric delivery and measurement systems

- Largely driven by (public and private) funders and regulatory requirements

## Inconsistent approach to data

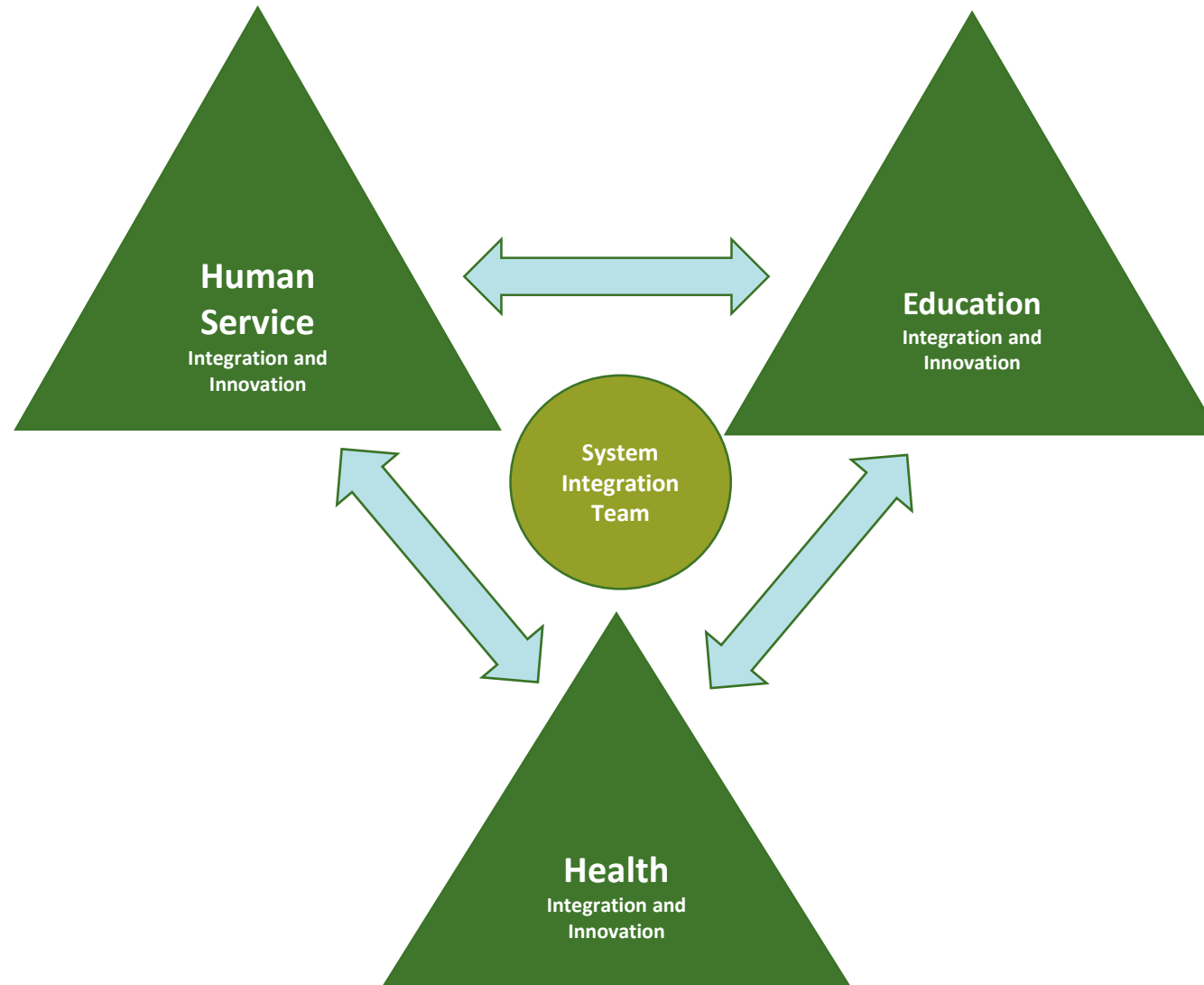


# 2016: One Community, Many Solutions





# Summer 2017: Systems Integration Team



**Role:** To connect and coordinate institutions and initiatives, across the health, education and human service sectors, that are engaged in systems-change activities.

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# Project Members



ROCHESTER  
REGIONAL HEALTH

ROCHESTER **RHIO**  
Regional Health Information Organization

**TheChildren'sAgenda**  
Smart Choices. Bold Voices.



New York State  
EDUCATION DEPARTMENT  
Knowledge > Skill > Opportunity



Rochester City School District  
Every student by face and name.  
Every school, every classroom. To and through graduation.



United Way **United Way of Greater Rochester**

**foodlink**  
abundance shared

**FARASH**  
FOUNDATION



**Catholic Family Center**

**NAZARETH COLLEGE**

**ACT Rochester**



**FLPPS**  
FINGER LAKES PERFORMING  
PROVIDER SYSTEM

**BOYS & GIRLS CLUBS  
OF ROCHESTER**

**Lifespan**  
take it on!

**ESL**  
Charitable Foundation™



**Education  
Success  
Foundation**

**Common Ground  
Health**

**RMAPI**  
ROCHESTER-MONROE  
ANTI-POVERTY INITIATIVE

**NYCOURTS.GOV** NEW YORK STATE UNIFIED COURT SYSTEM  
7th JUDICIAL DISTRICT

NEW YORK  
STATE OF OPPORTUNITY.  
**Finger Lakes  
Regional Economic  
Development Council**

**Monroe County  
Medical Society**

Advocating for Physicians. Protecting Patients.  
Join Us.



**Excellus**

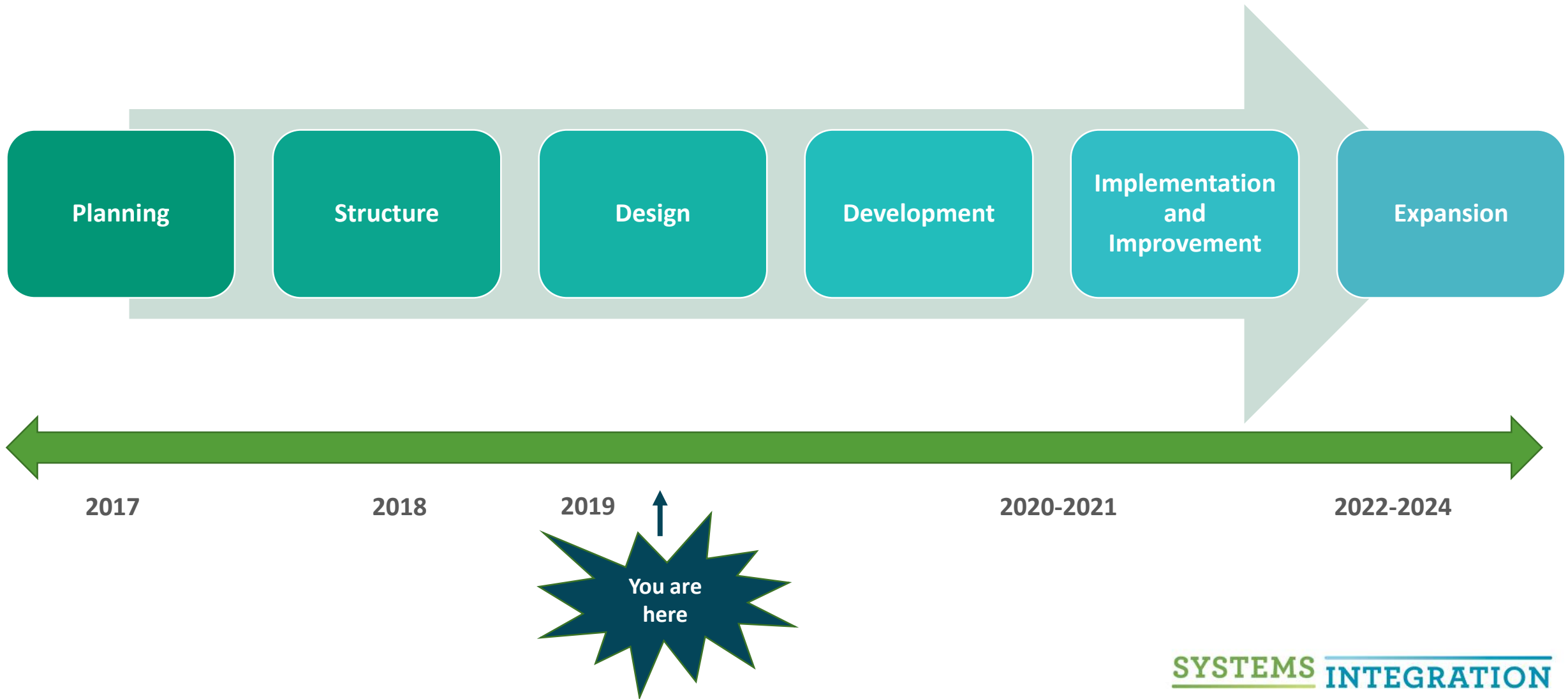
**children's  
institute**  
STRENGTHENING SOCIAL AND  
EMOTIONAL HEALTH

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# Phased Implementation

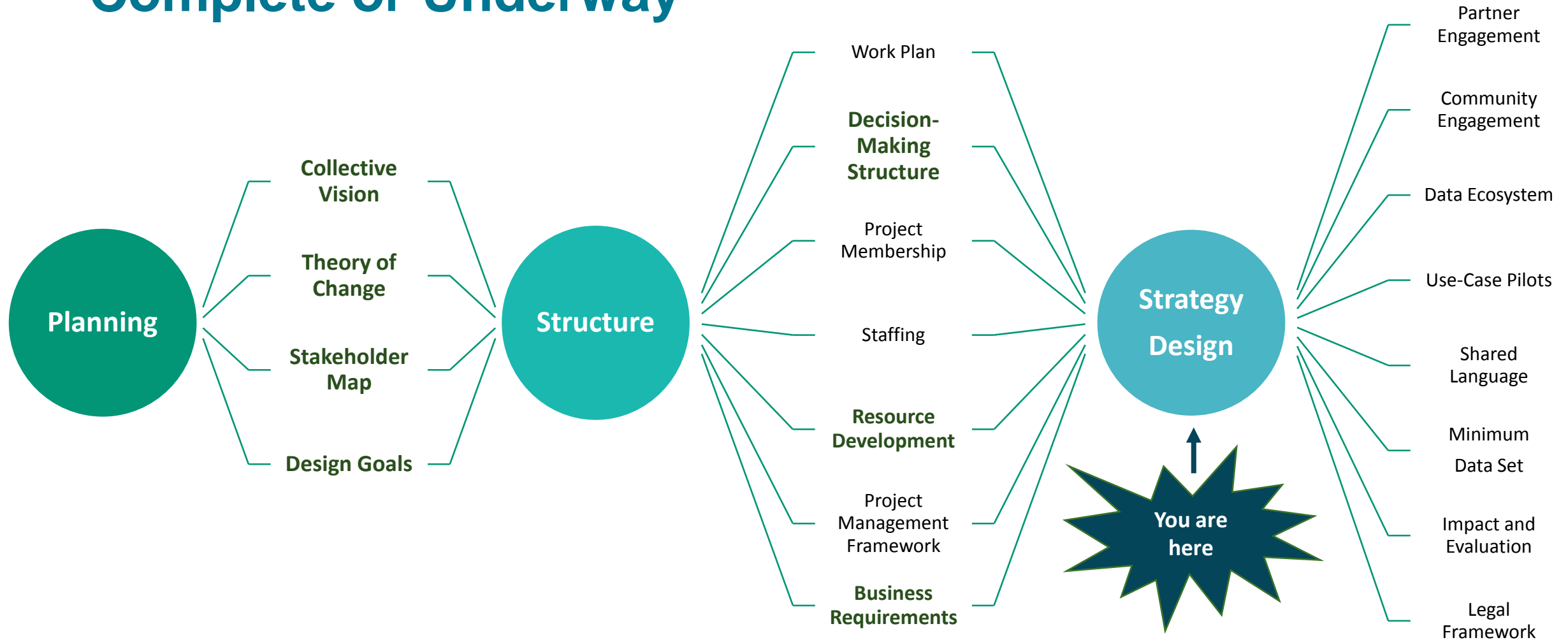


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# Complete or Underway



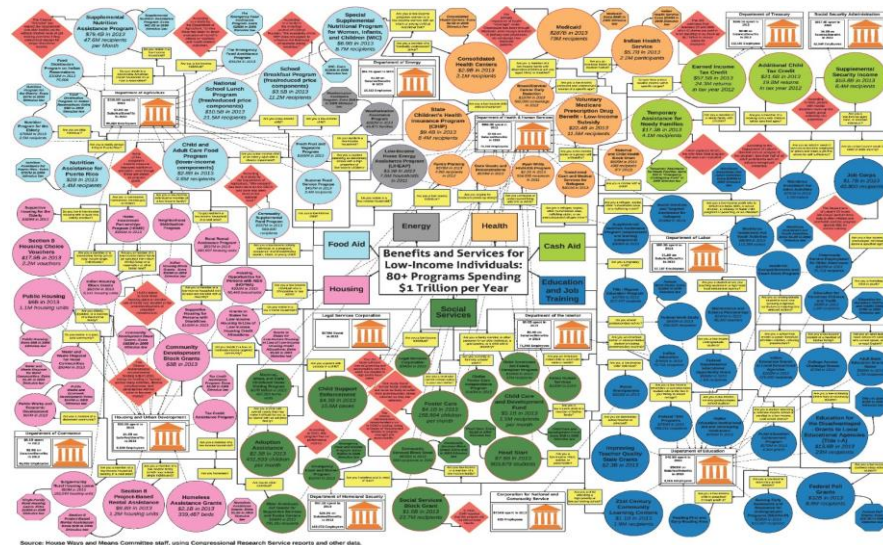
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# Collective Vision

The greater Rochester community is working across a diverse network of committed providers to build an **interconnected, person-centered system** of health, human services, and education leveraged by a **unified information platform**, to improve the **health and economic well-being** of individuals and families, especially those who are **vulnerable and/ or impacted by poverty**.



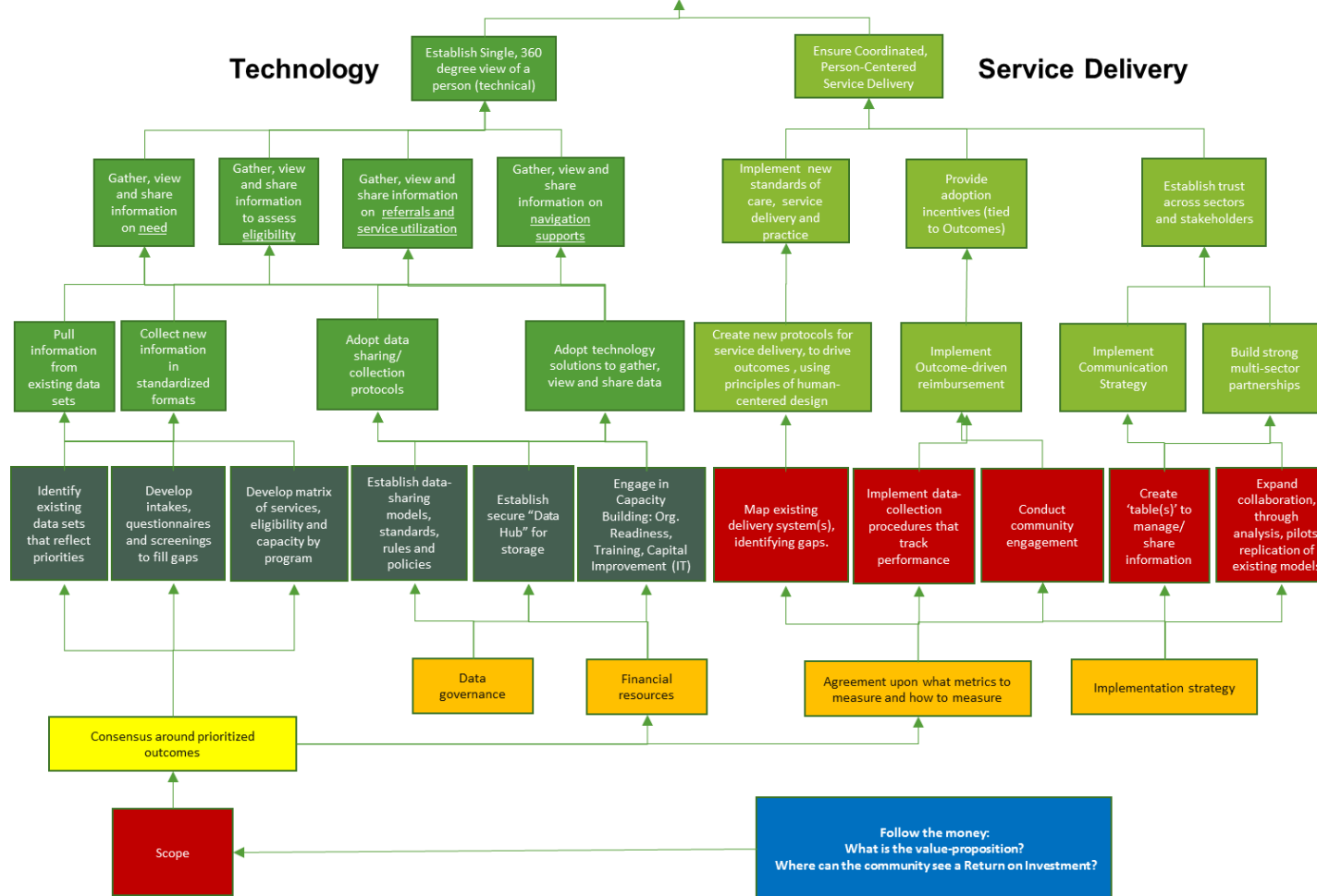
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# Theory of Change: Phase One

**Vision:** The greater Rochester community is working across a diverse network of committed providers to build an interconnected, person-centered system of health, human services, and education leveraged by a unified information platform, to improve the health and economic well-being of individuals and families, especially those who are vulnerable and/ or impacted by poverty.



**Starting Point:** IBM Report

**Value:** Process and Transparency

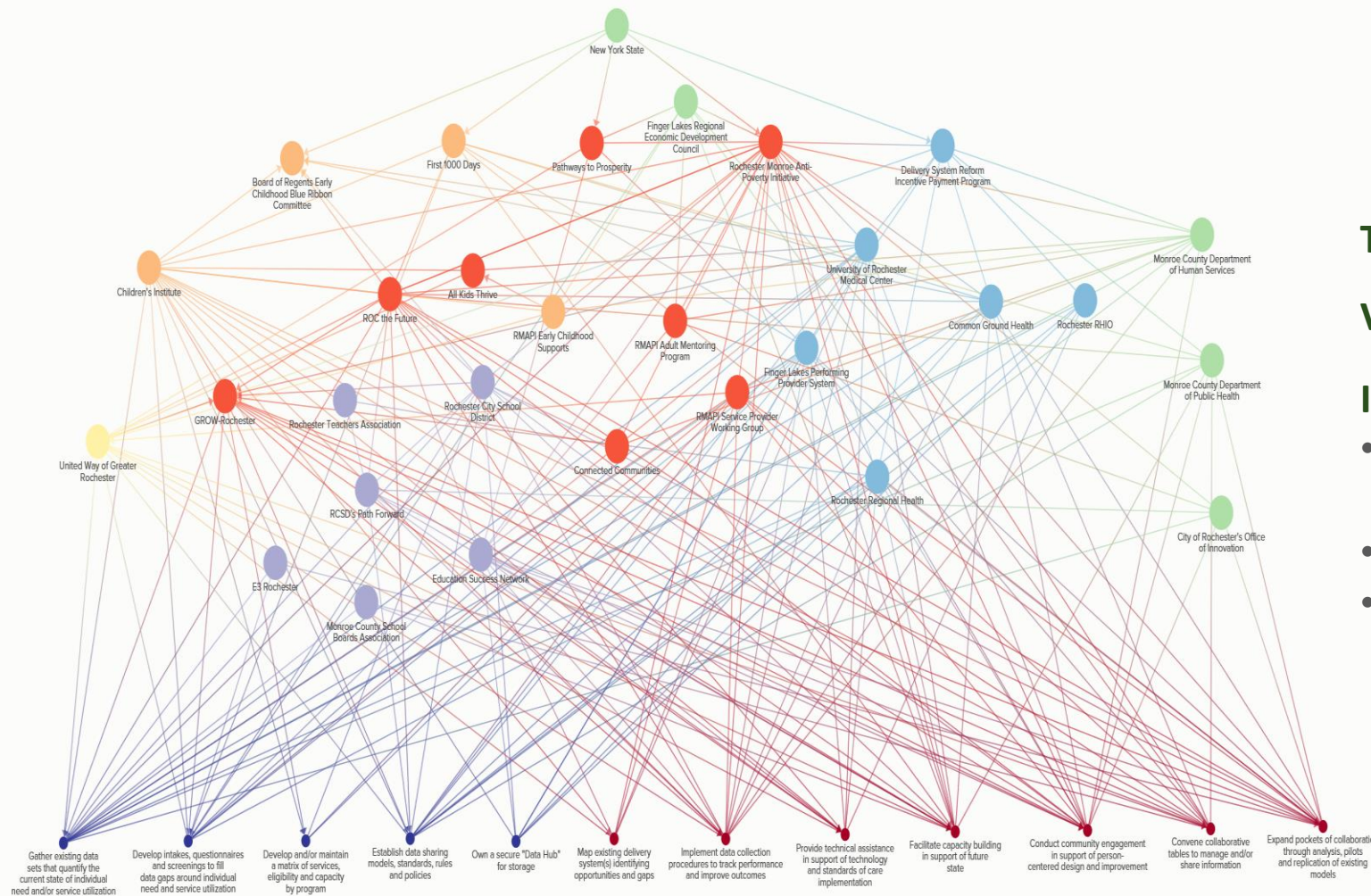
**Challenge:** Pervasive, Siloed Ownership

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# Stakeholder Map



**Tool (s):** Key Informant Interviews, Kumu

**Value:** Transparency

**Insights:**

- Each stakeholder brings assets to the project
- Activities are underway in every sector
- Reiterates need integrate and leverage

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# Design Goals

Theme	An Integrated System...
<b>Simplicity</b>	Is simple for providers to use and easy for individuals and families to navigate
<b>Efficiency</b>	Allows for greater efficiencies: funding efficiencies, timely response of services and improved interactions between systems and sectors
<b>Comprehensive</b>	Includes a comprehensive data set that allows users to view/define/analyze and address individual/family needs
<b>Person-Centered</b>	Is “person-centered”
<b>Accessibility</b>	Is easily accessible for those who need it
<b>Continuous Improvement</b>	Maintains a flexible structure that maximizes our ability to continuously improve the future state, leveraging real-time usable information, rapid cycle improvement and predictive analytics
<b>Accountability</b>	Holds both users and individuals/families accountable using methods of encouragement and incentive rather than penalty
<b>Innovative/Data Driven</b>	Uses innovative, data-driven practices that facilitate the sharing of information across sectors
<b>Apolitical</b>	Is apolitical
<b>Do no harm</b>	Applies the principle of Do No Harm



## Tool: Group Work:

- What are the problems/ “barriers” that Systems Integration is trying to solve for?
- What need is an integrated system is trying to satisfy?
- What value will an integrated system provide?

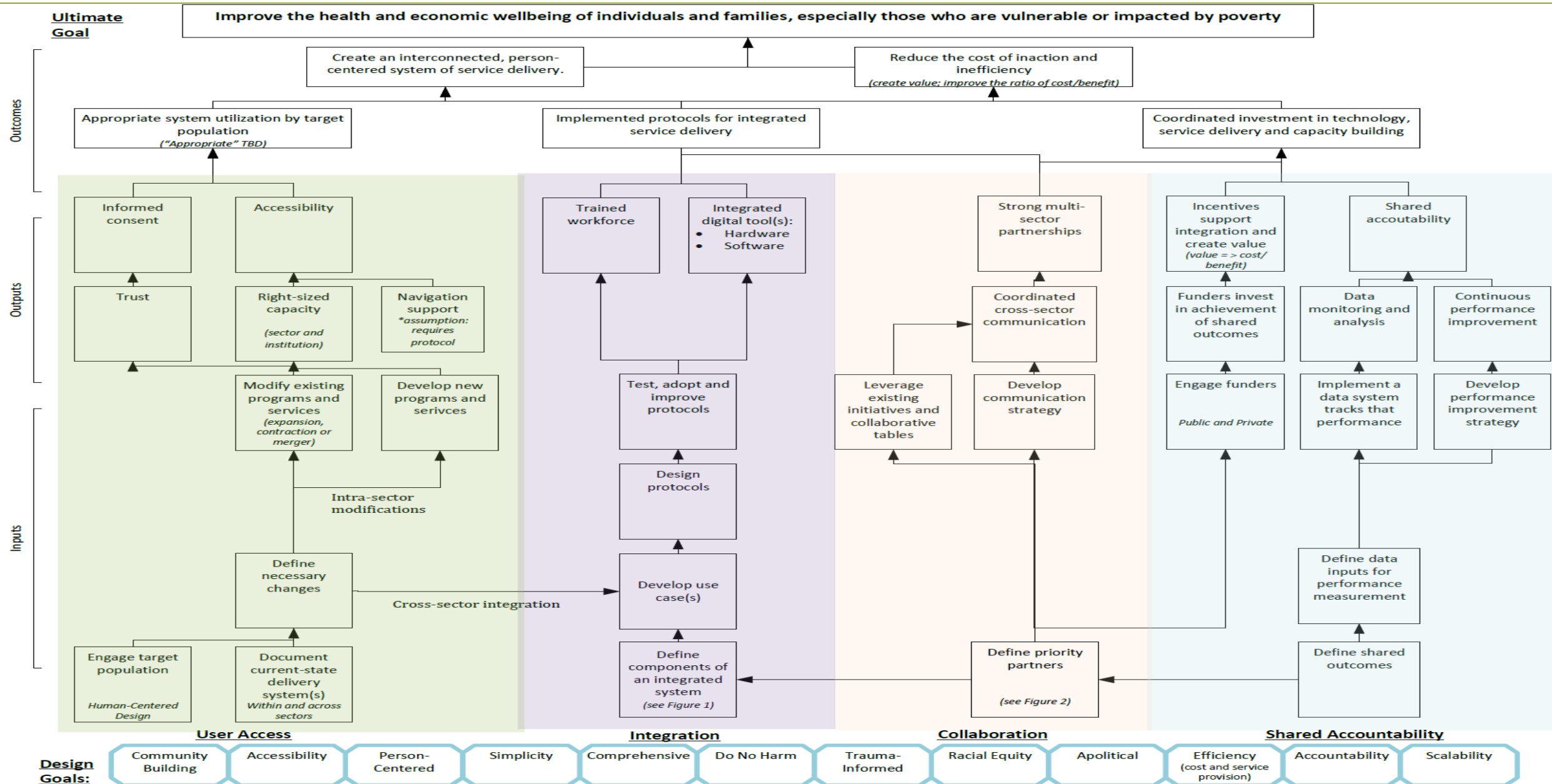
## Value: Shared Accountability Framework

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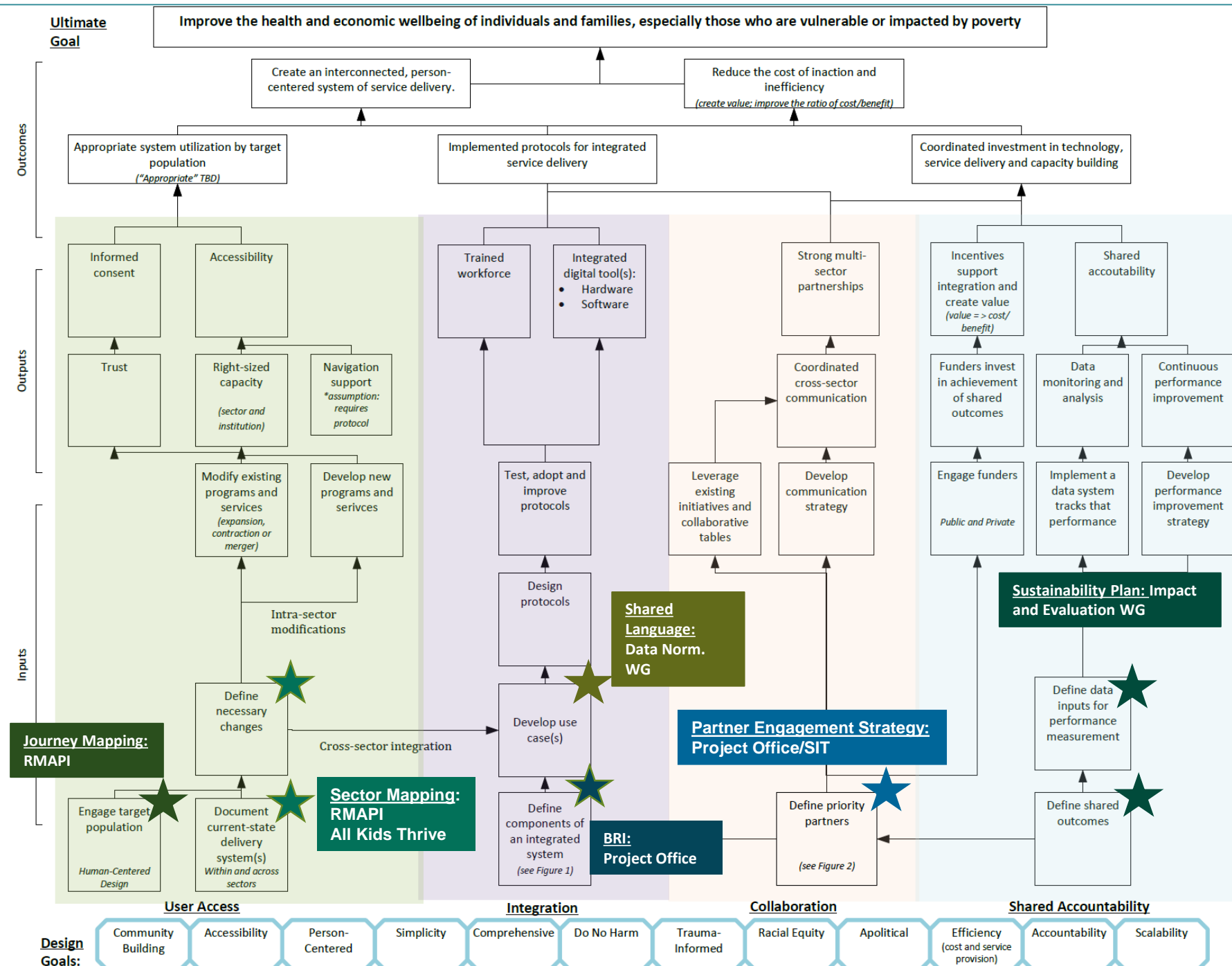
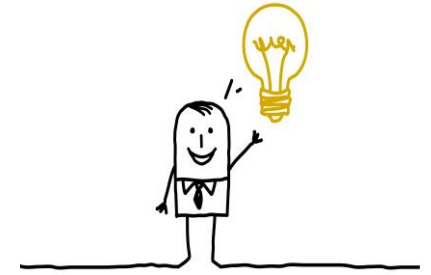


# Theory of Change: Phase Two





# Theory of Change in Practice



## Insights:

### TOC Remains Roadmap for the Project

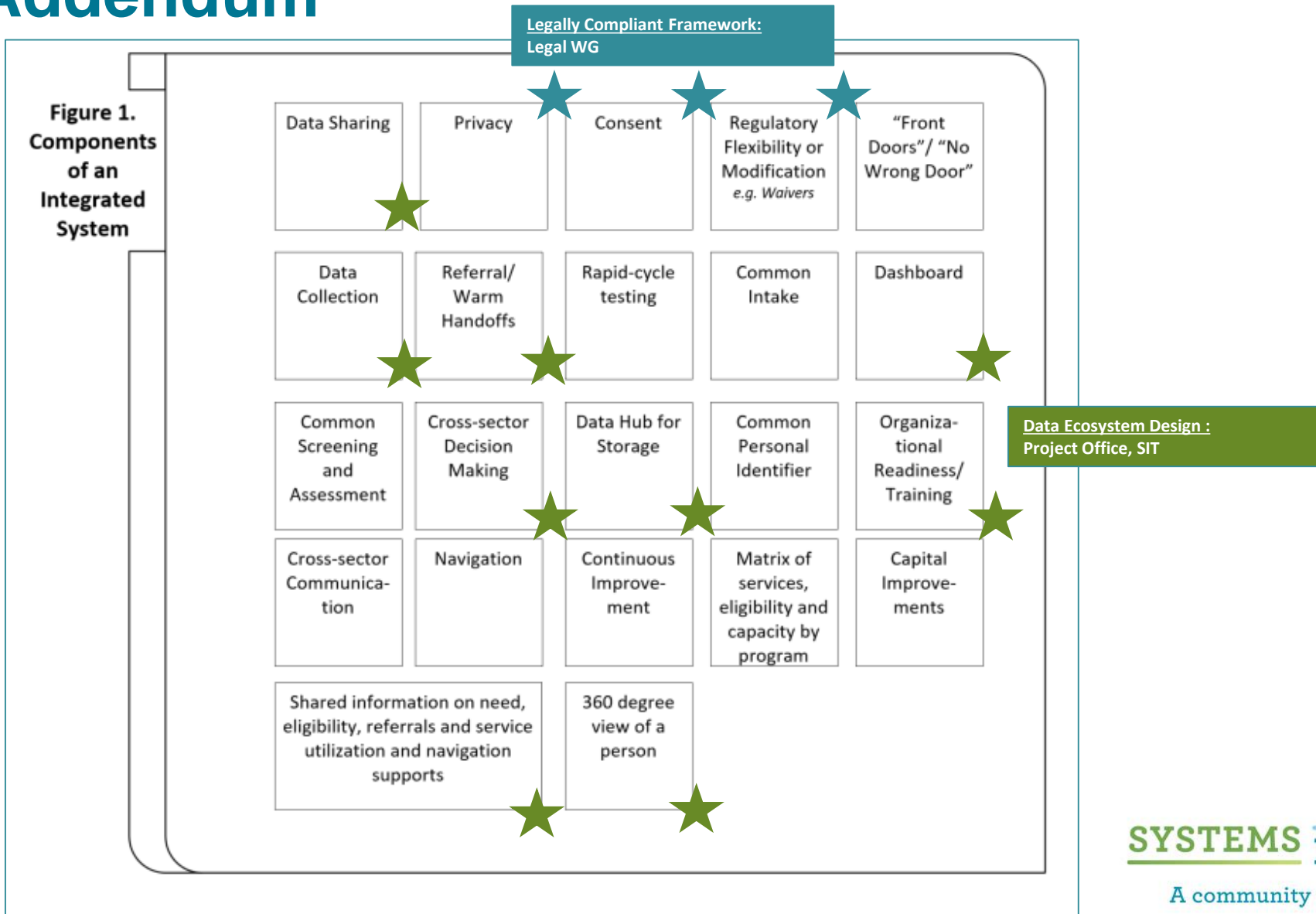
- Used to set work plan and evaluation metrics
- Used to identify opportunities for collaboration

### Decision-Making Structure and TOC Fully Integrated

### Value: Shared Accountability, Transparency, Trust

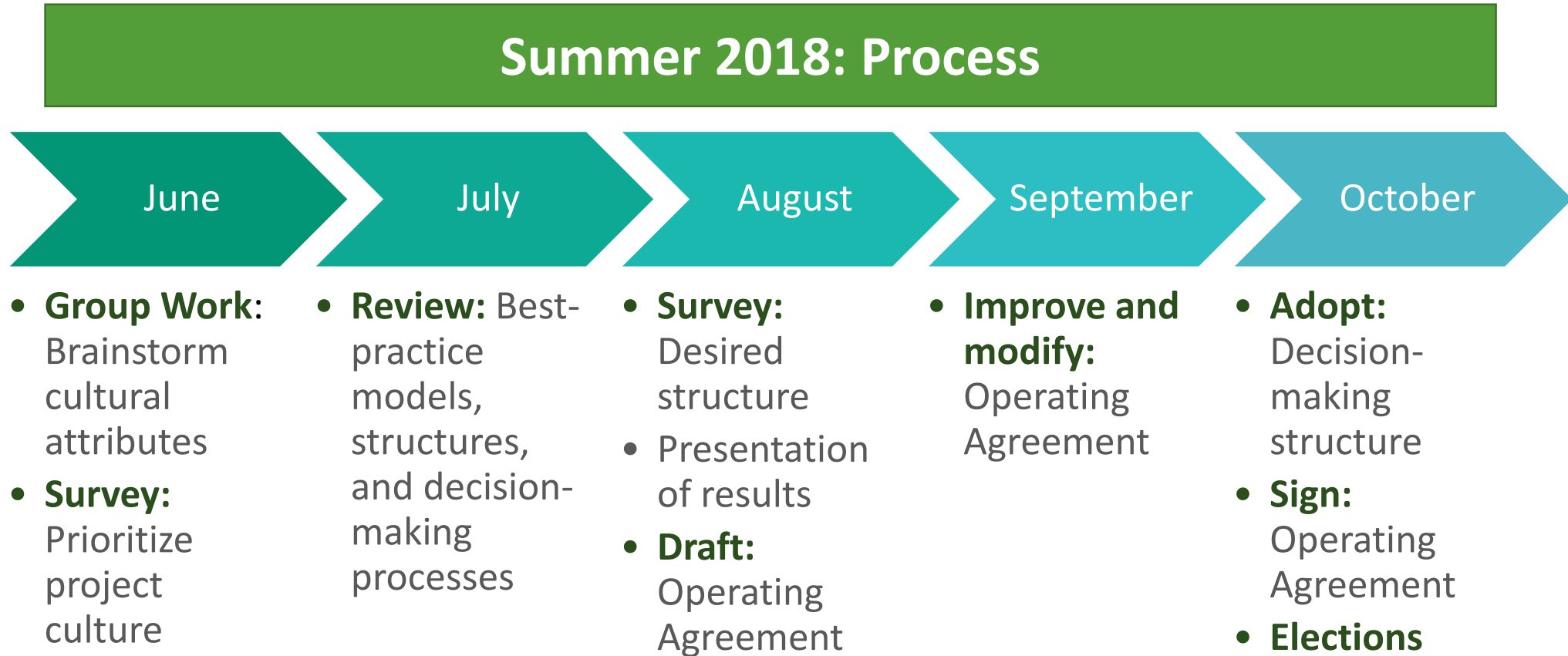


# TOC Addendum





# Establishing a Decision Making Structure





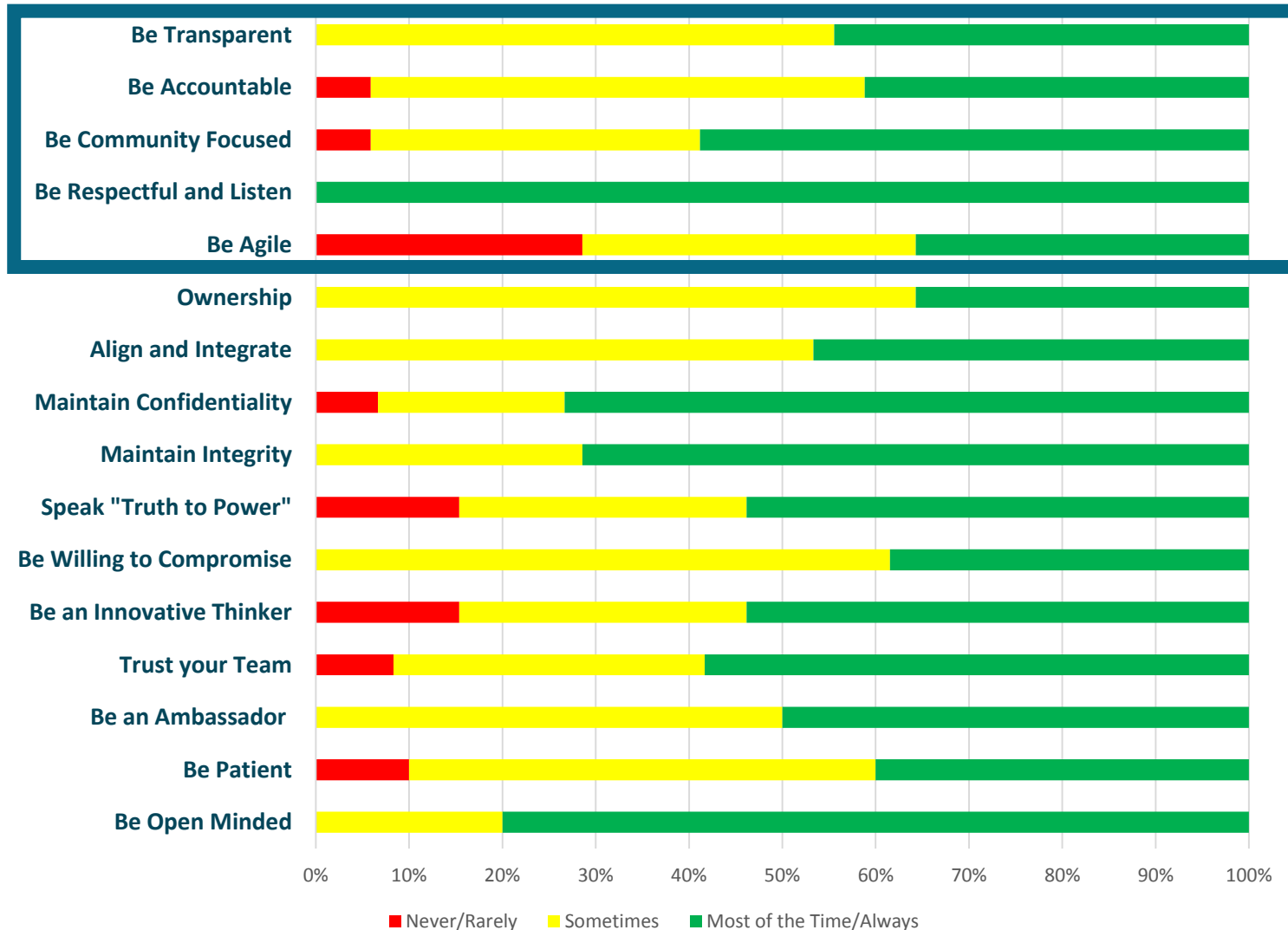
# Deep Dive: Co-Creating Culture

## Group Work:

- What are the behaviors that you expect of your partners, which you are also willing to hold yourself accountable to?
- **Survey:**
  - *Rank each attribute by level of importance to ensuring project success.*
  - *Is this his behavior is practiced by members of the Systems Integration Team?*  
(never, rarely, sometimes, most of the time, always)



# Culture: Priorities and Current State



**Tool(s):** Group Work, Survey Monkey

**Value:** Shared Accountability

**Framework**

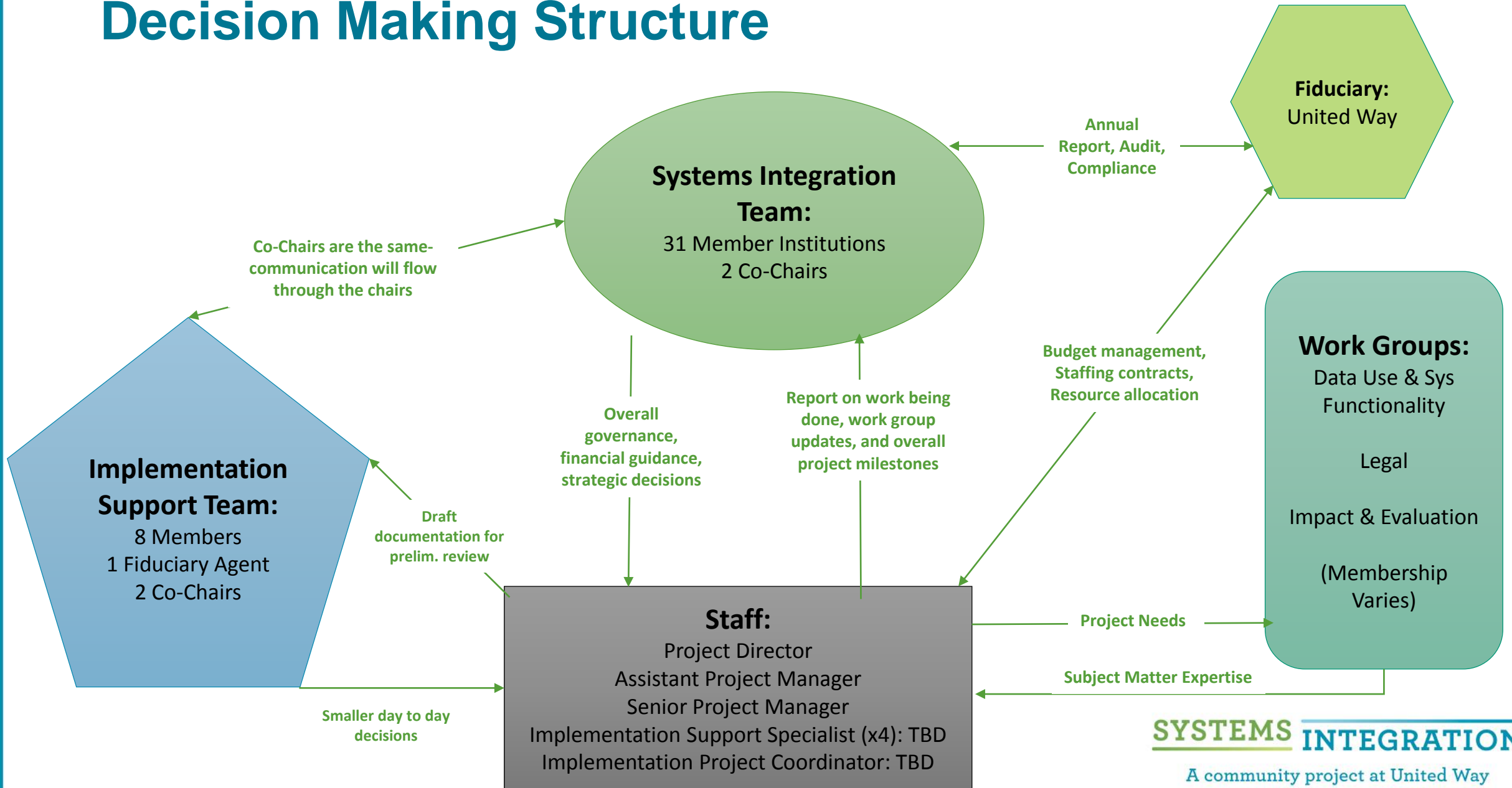
**Quote:** *"Culture is as much a part of the large-scale change process as developing strategies, engaging stakeholders, securing capital, and other work."* (Brenner, 2018)

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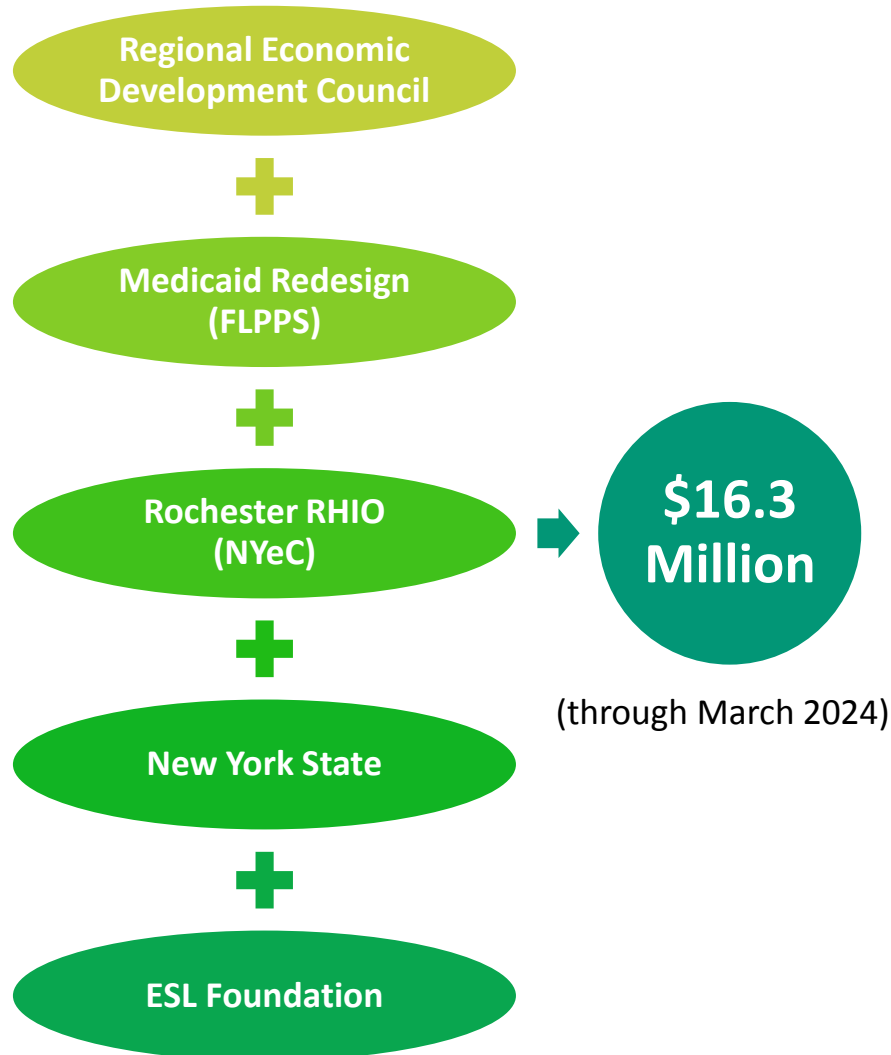


# Decision Making Structure





# Resource Development



**Tool(s):** Braided Funding

**Insights:**

- Neutral Dollars First
- Shared Ownership

**Value:** Trust, Shared Accountability

**Challenge:** Alignment takes continuous effort

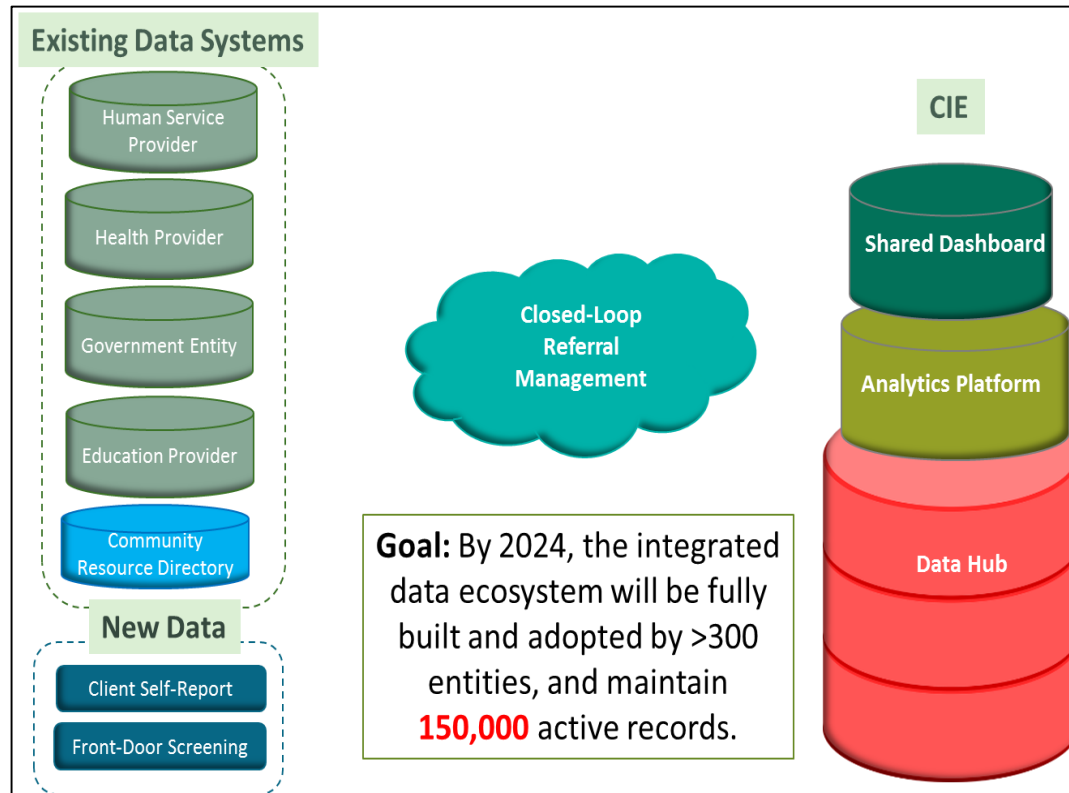
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# Business Requirement Interviews

## Planned Data Ecosystem



**Goal:** Gather feedback from potential system users about how they would like the proposed integrated data ecosystem to work for them.

### Logistics:

- 2 hours in length
- IT Expert
- Operational Expert
- Executive Decision-Maker

### Areas of Focus:

- IT Current State
- Reporting and Outcome-Related Commitments
- Desired Impact
- Business Requirements and Use Cases
- Risk/Mitigation
- Resource Availability
- Adoption Criteria
- Desired SIP Outcomes

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# BRI's: Early Returns and Next Steps



- **40 Interviews**, including:
  - 8 CBOs
  - 5 Multi-Stakeholder Initiatives
  - 8 Schools
  - 2 Health Systems
  - 1 MCO
  - 4 Public Entities
  - 5 Private Foundations
- **Qualitative Analysis** by Rivet CX Group
  - User Experience Focus

## Insights:

- Buy-in can't be fully created in committee
- Each provider has a unique starting line
- People want to dream with you
- User experience is key

**Value:** Builds Trust, Shared Accountability

**Anticipated Result: Community-Wide Business Requirements**

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# Final Thoughts



**Shared Accountability is a Paradigm Shift**

**40% Rule**

**Data as Public Good**

**Balance Process with Action**

**Authentic Leadership**

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# The Collaborative Efforts of two Local Health Department Programs to Advance Patient (Population) Health



Modinat Lawal, MPH  
Ivonne Ugarte, BS  
CIE Summit 2019  
April 26, 2019





# 2-1-1 Texas Rio Grande Region

- Referral process within the El Paso Health Department commenced early 2006
- Callers receive information on services such as utility bill assistance, rent assistance, food, shelter, counseling, clothing, child care, disaster relief and more.
- 2-1-1 continues to develop and evolve as a result of the growing public awareness of information and referral from the community and state and national leaders
- Other States have a variety of 2-1-1 coverage and collaboration models, but the Texas model is recognized for its flexibility, efficiency and accuracy.







# 2-1-1 Texas Rio Grande's Priority Population

- Estimated County Population: 840, 410
- Median Age: 32.1 years
- Gender: 51.3% female and 48.7% male
- Population Hispanic or Latino: 80.8%
- Families below the federal poverty level: 21%
- Median Income: \$43,244
- Uninsured Population: 22.6%



*(2017 Community Survey) (SAIPE) (U.S Census Bureau)*





Colonias- underserved areas located  
along the U.S.- Mexico border

81% Hispanic Population







**TEXAS**  
Health and Human  
Services



*"Delivering Outstanding Services"*





# 2-1-1's Scope of Services



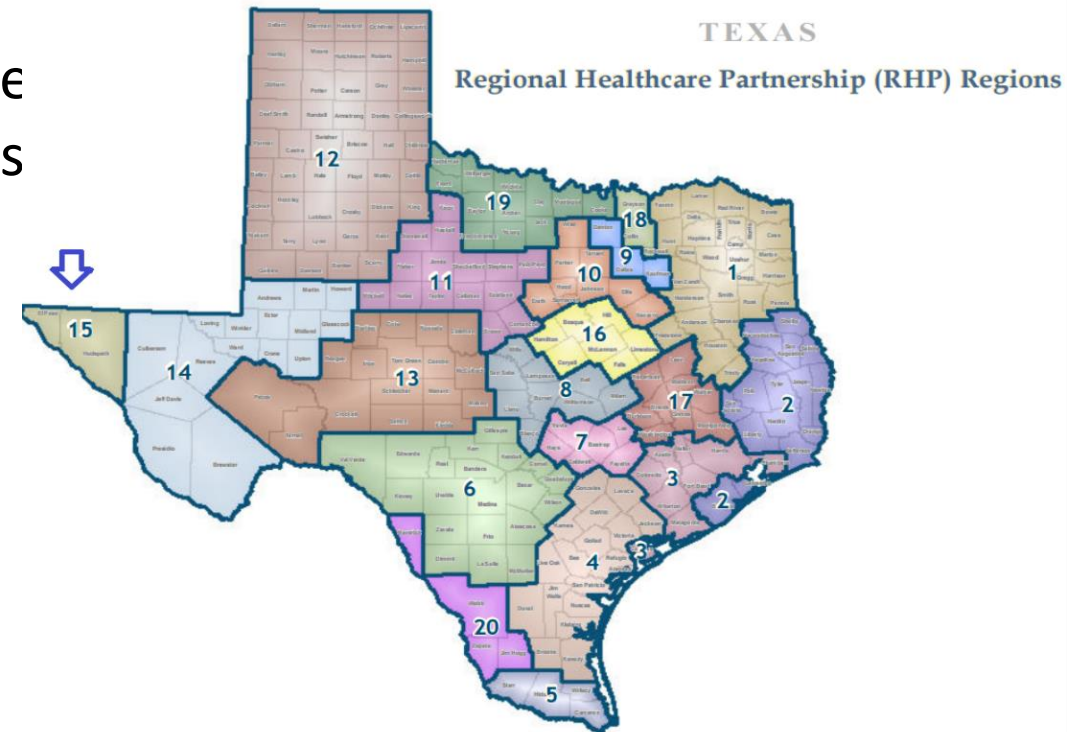
- Health, social, and human services
- Supplemented with resources from non-profit agencies
- The variety of organizations within the 2-1-1 Texas Information and Referral Network helps ensure that the work of 2-1-1 is inclusive of all services available to unserved people in Texas
- The 211 Statewide Network maintains resources in Region 10 (Brewster, Culberson, El Paso, Hudspeth, Jeff Davis and Presidio Counties).





# Medicaid Waiver (MW) Program

The purpose of the 1115 Healthcare Transformation Waiver is to transform service delivery among participating providers to improve access to care, patient experience, service coordination, and cost effectiveness







# Expanding Service Delivery

- Border Public Health Interest Group
- Community Health Atlas
- Health Information Exchange
- Mobile Dental Clinic
- Neighborhood Fire Stations







# Shared Vision

**2-1-1 Texas Rio Grande Region:** connecting Texas citizens to vital health and human services

**Medicaid Waiver:** increasing access to/use of preventive health services to support a healthy environment

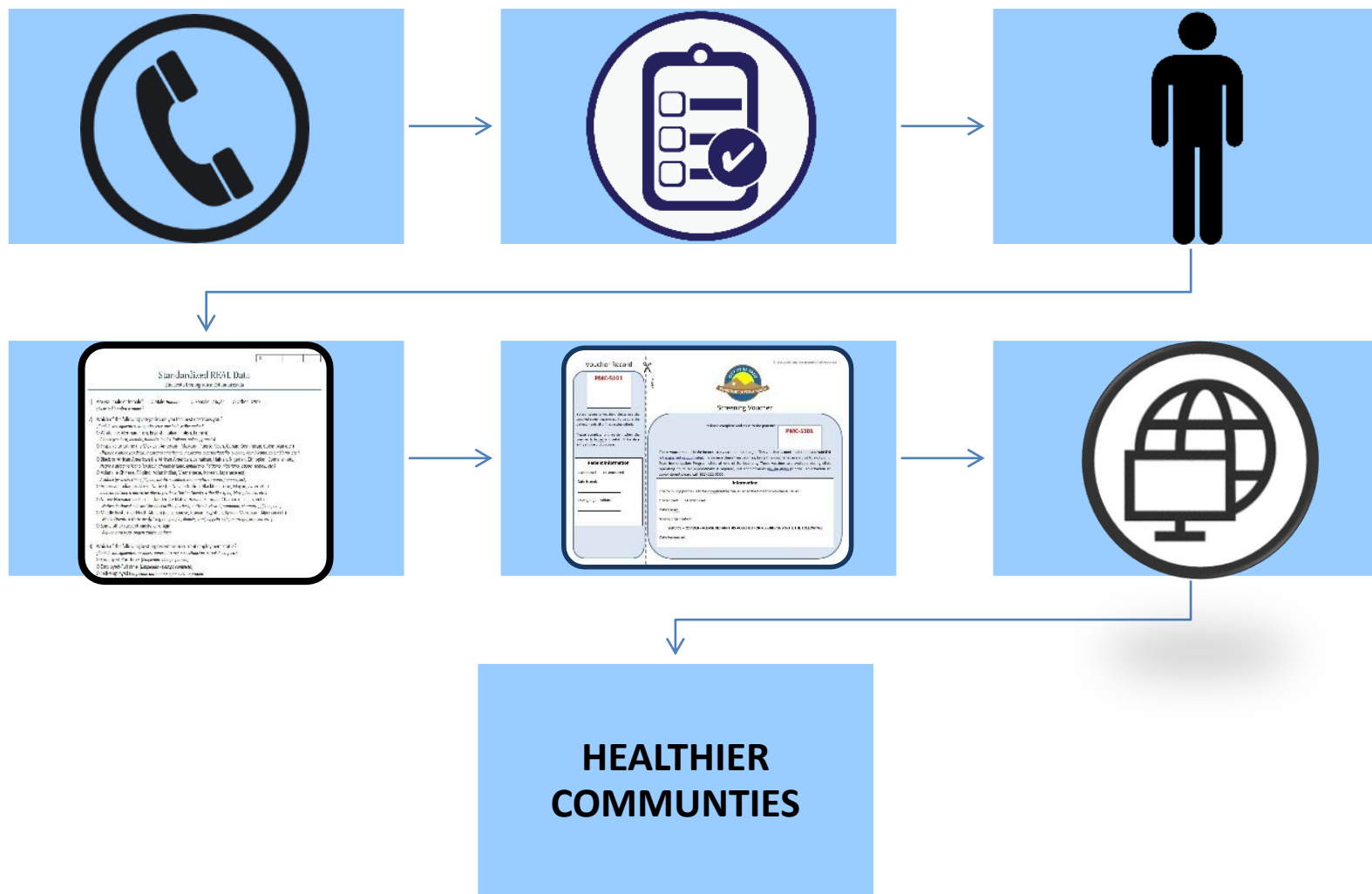
**Shared vision:**  
improving the health status of underserved populations via participation in the **Health Information Exchange (HIE)**

*"Delivering Outstanding Services"*





# Achieving the Shared Vision







# Establishing Trust



## Internally

- Monthly program manager meetings
- Review common deliverables and set goals
- Bi-weekly correspondence about status of MW-211 project
  - Assigned leads from both programs to monitor status

## Externally

- Health Department serves as the Public Health Authority
- Engage in dialogue with stakeholders of multisector organizations serving similar populations
- Participate in coalitions





# Multisector Partnerships



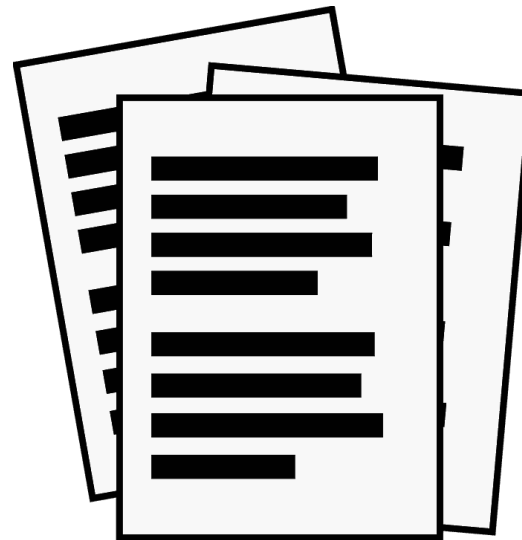
"Delivering Outstanding Services"





# Terms of the Data Exchange

- Business Associate Agreements
- Memorandum of Understanding
  - Written agreements to delineate role of each partner
  - Discloses the sharing of personal health information for public health/funding purposes







# Accomplishments

- **~415 Medicaid and Low-Income Uninsured** persons reached through this initiative
- Provide referrals to three key services:
  - Mammograms
  - FOBTs
  - Pneumonia Vaccinations
- National Association of County and City Health Officials (NACCHO) Recognition

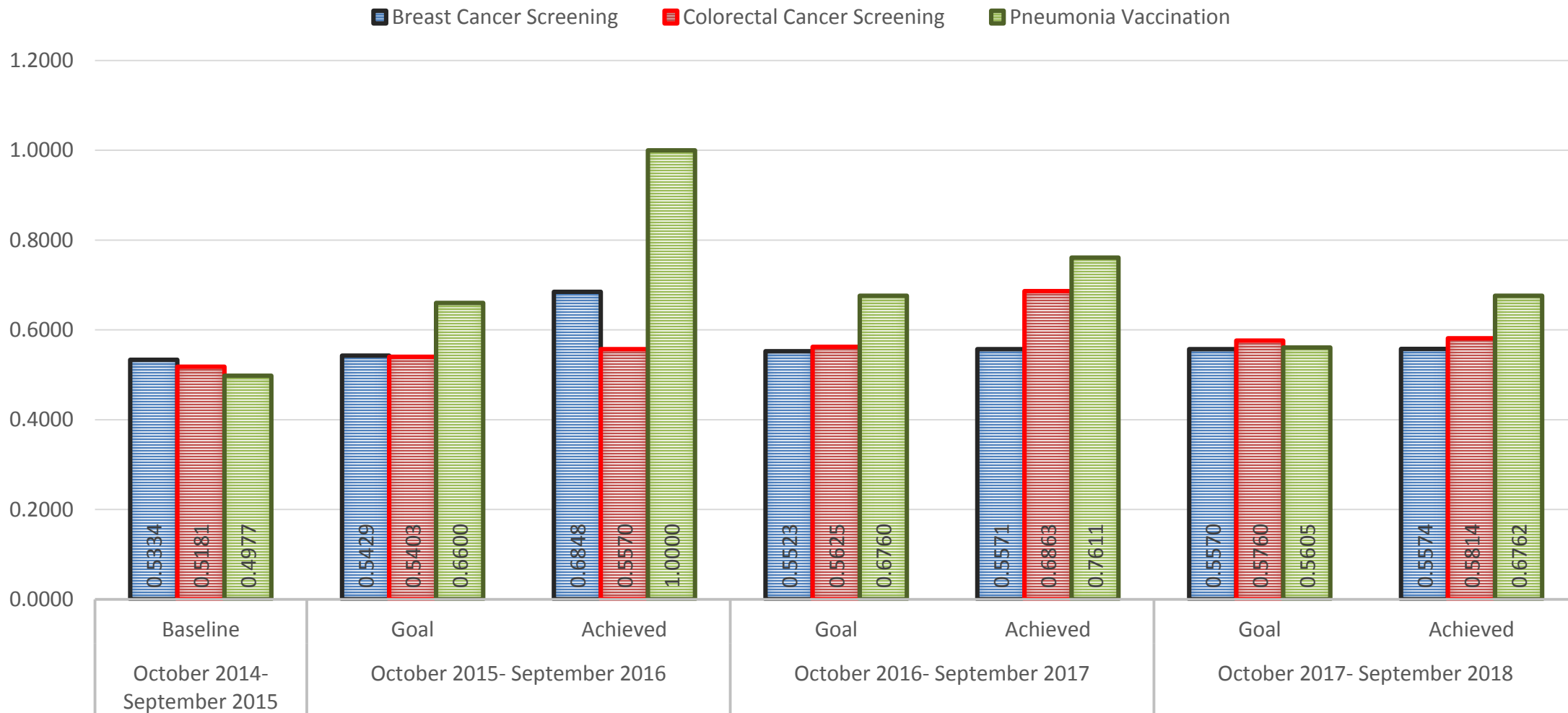


*"Delivering Outstanding Services"*





# Focused Areas of Service



*"Delivering Outstanding Services"*





# Creating an Efficient System

## Challenges

- ❑ Coordinating schedules between programs
- ❖ Attracting interest of eligible callers
- Voucher redemption and service attainment



## Lessons Learned

- ❑ Shared calendar amongst project leads
- ❖ Education about preventive health activities
- Reminders and incentives





*...because everyone deserves good health!  
... porque todos merecen buena salud!*

# THANK YOU!

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#EPMedWaiver #EPHealth

*"Delivering Outstanding Services"*

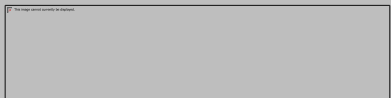


# BUILDING HEALTHIER COMMUNITIES TOGETHER

Software Connecting Health and Social Service Providers



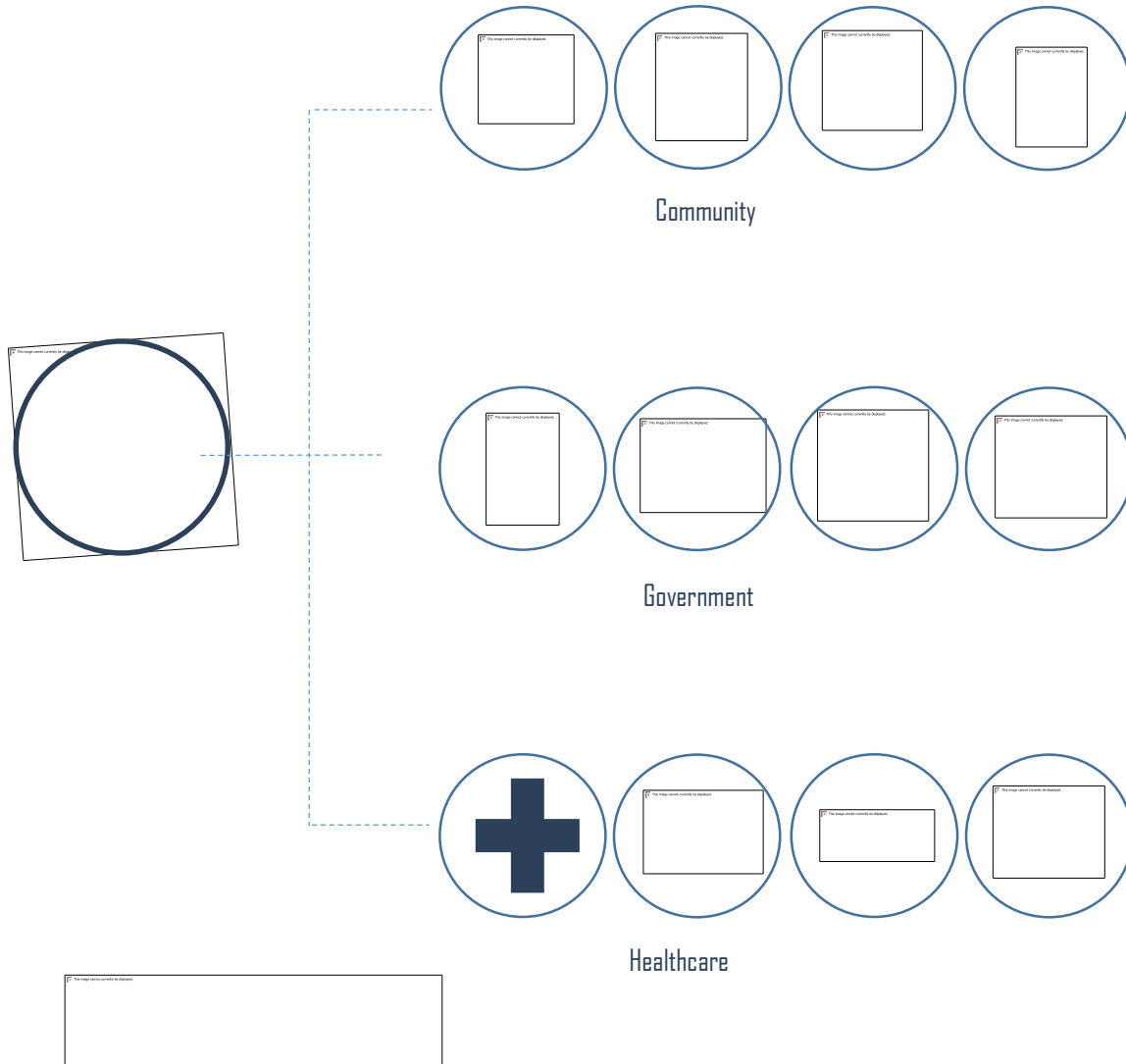
Taylor Justice  
Co-Founder & President





# THE PROBLEM

Service Providers are Fragmented



1. Healthcare and social service providers both **lose visibility** after their patients are discharged.
2. Co-occurring health & social needs are often **under-addressed** across the community
3. Vulnerable patients are **seeking clinical care for social problems**



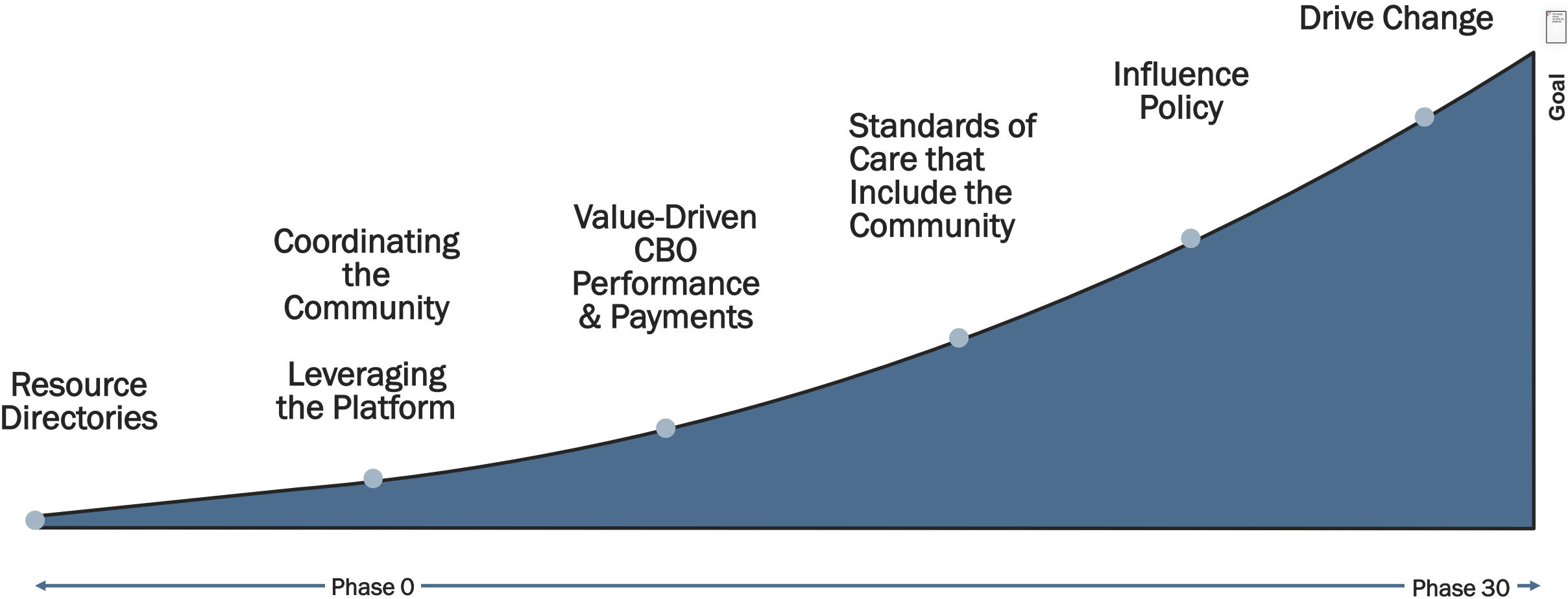
# WHAT DO YOU NEED TO CONSIDER

## WHEN FOSTERING CROSS SECTOR COLLABORATION

1. Patient/Client First
2. Empower Communities to Drive Outcomes
3. Security
4. Scalability
5. Sustainability



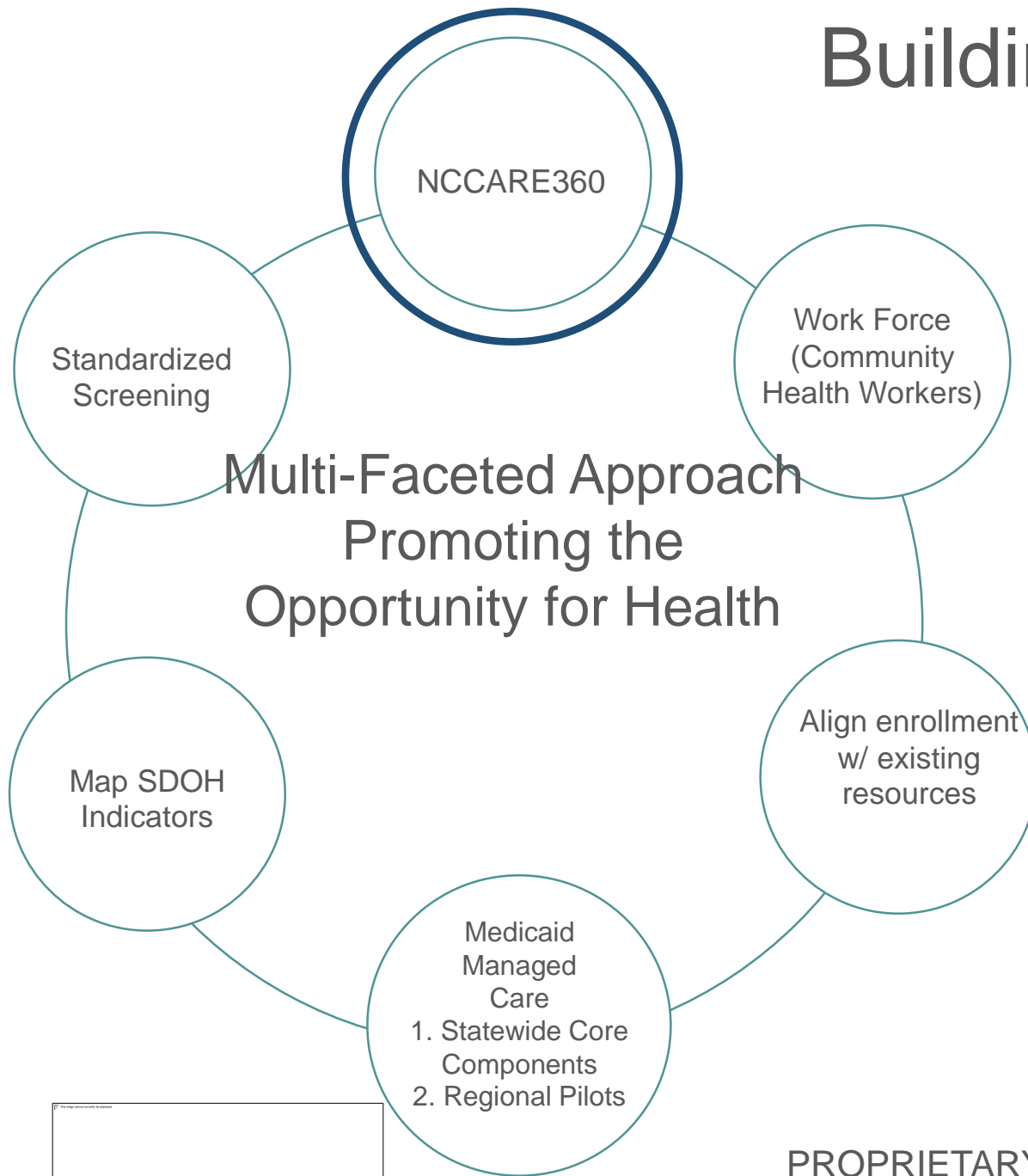
# Where We Are Going





# Building a Healthier North Carolina

## Part of a Broader Statewide Framework



### Charter

100 Counties in 24-months

Min. 5 Service-Categories in each county

All populations (+10mm people)

### Team

12-person team

Located in Raleigh, Charlotte, Asheville



# YOUR COMMUNITY RESOURCES IN ONE PLACE

## Out of Network

*Organizations that have not been onboarded to the platform*

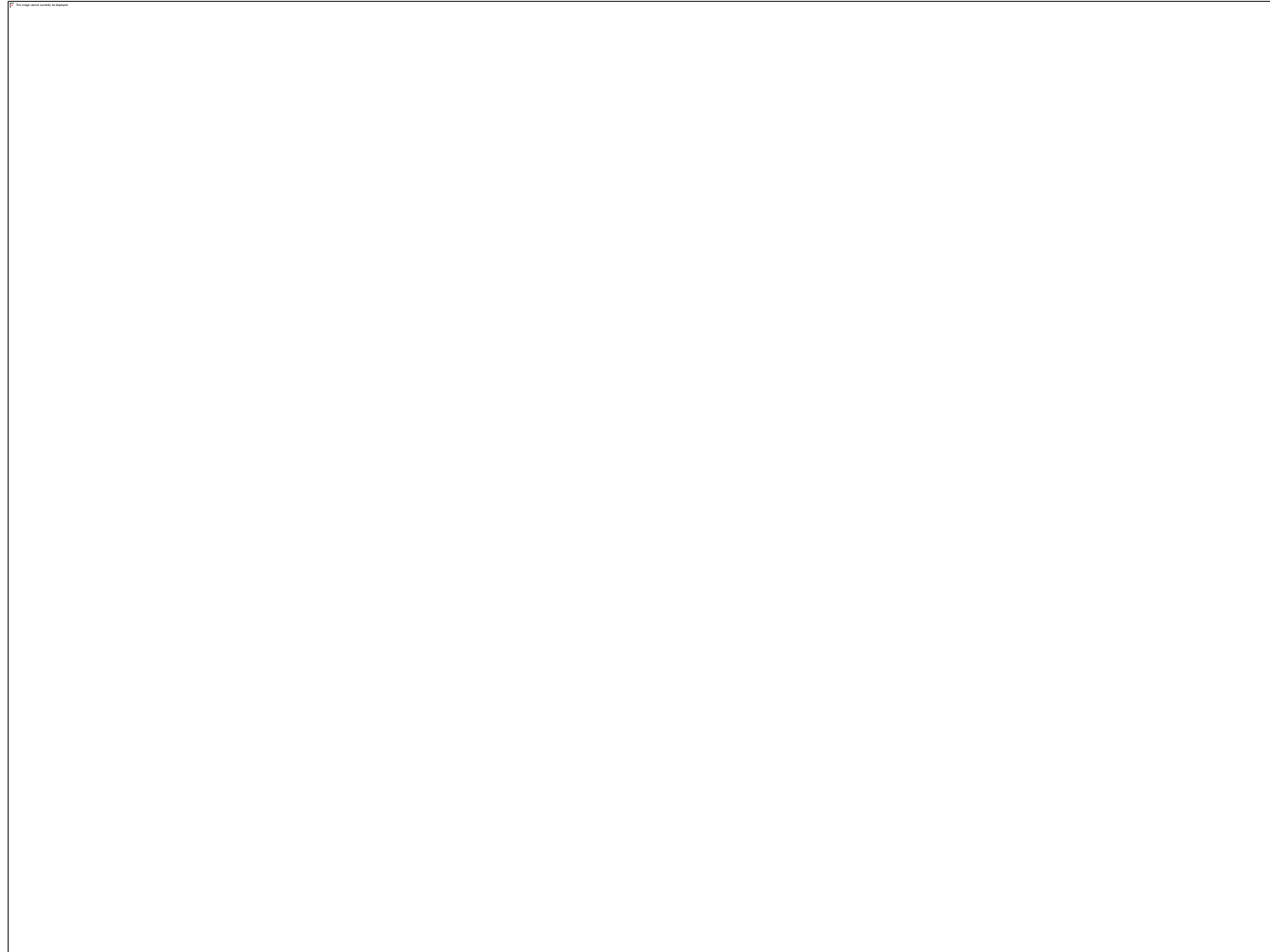
- Searchable, Identifiable but manual referrals

**Vs.**

## In Network

*Organizations onboarded to the platform*

- Searchable, Identifiable with electronic referral capabilities



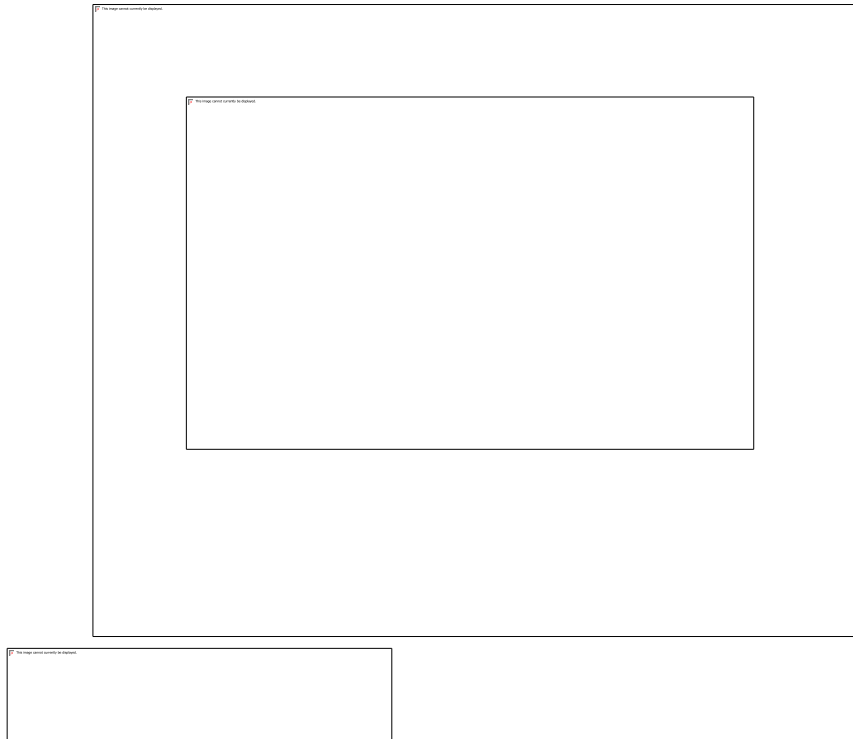


# DRIVING AN ROI REQUIRES MORE THAN A DIRECTORY

## YOU NEED OUTCOME DATA TO PROVE IMPACT

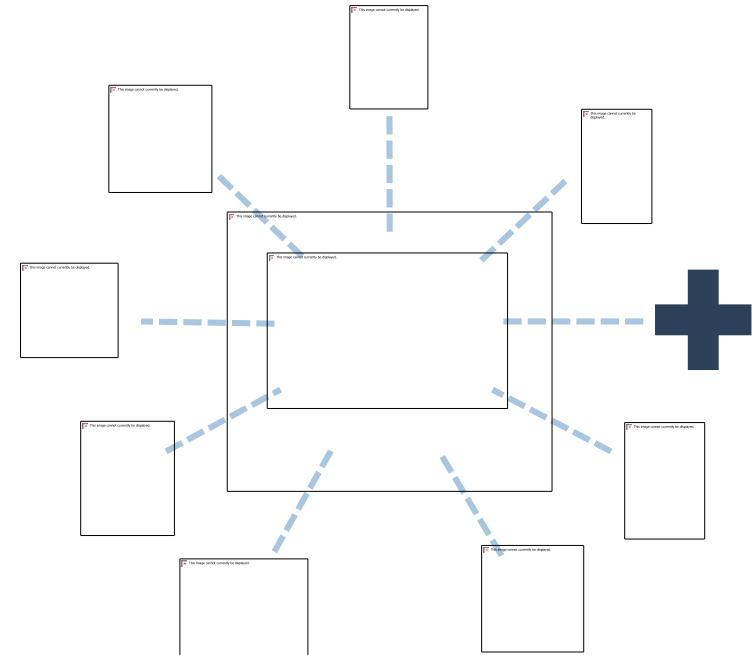
Our resource directory is just the start:

If don't have engaged & accountable CBO's, you only have a 2.2% chance of knowing the outcome.



It's about the network behind the directory:

We track 100% of patient outcomes with external partners, with an 84% chance of improving their health.



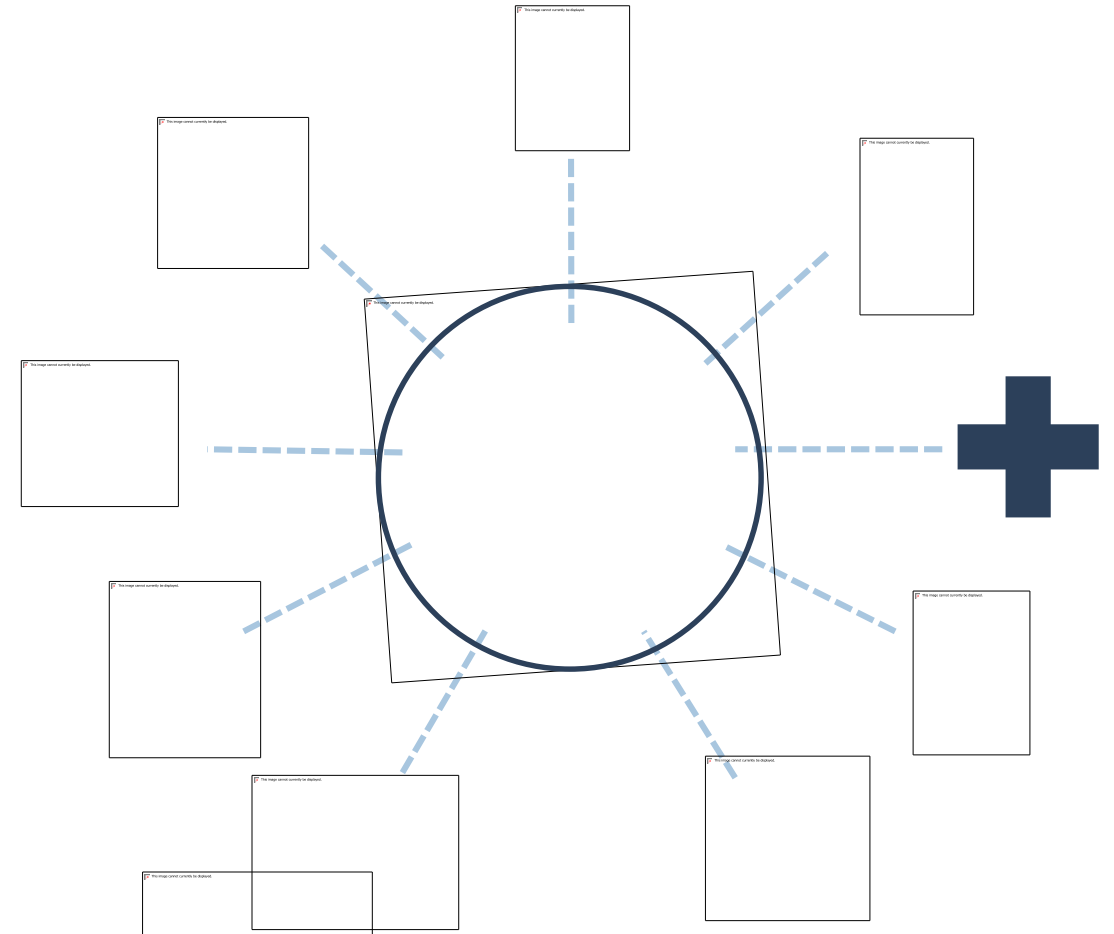


# MUST EXTEND REACH, VISIBILITY, AND IMPACT

THE PATIENT-CENTERED SOLUTION & EXPERIENCE

**Knowhow:** Create quality, collaborative and accountable community networks.

**Software:** Easy-to-use platform tracks every step of the patient health journey inside and outside of your four walls.



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# HOW WE BUILD YOUR COMMUNITY NETWORK

4 STEP PROCESS THAT'S PERSONALIZED AND FITS INTO YOUR MODEL & PROVIDER WORKFLOWS

---

DISCOVERY & SOCIALIZATION

TRAINING & ONBOARDING



NETWORK CONFIGURATION

POST LAUNCH SUCCESS

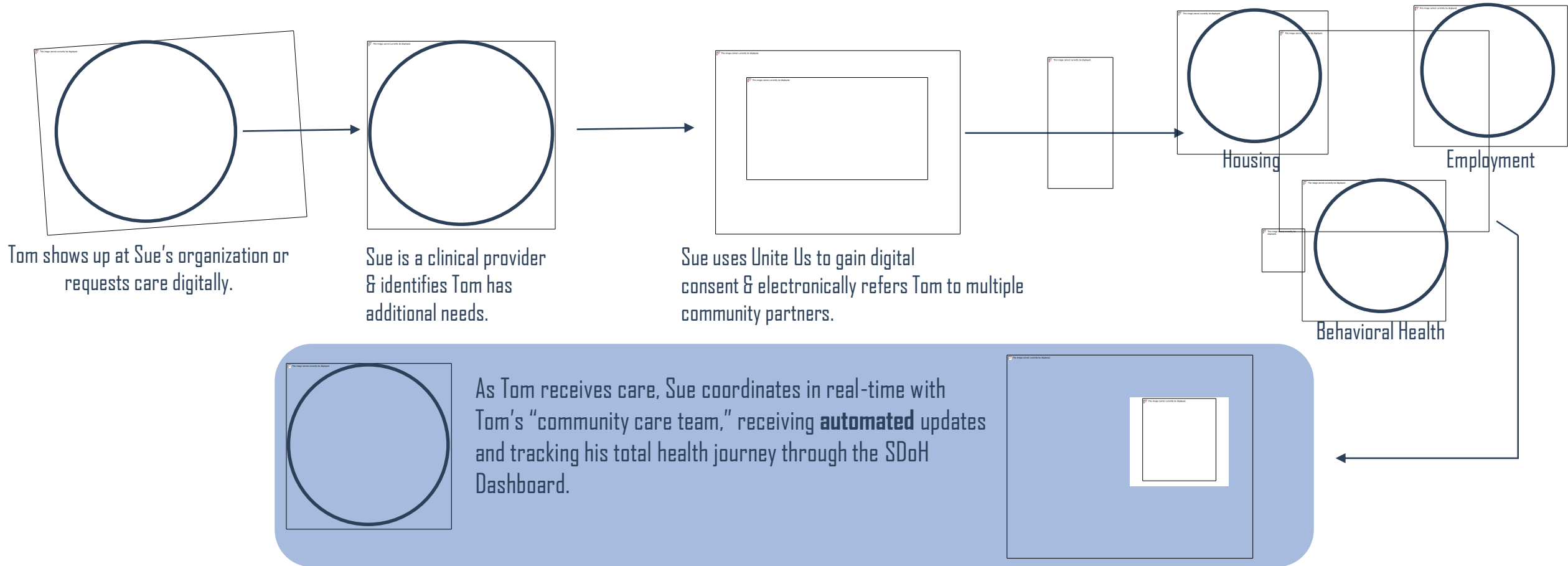
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# ACCESSING CARE & SERVICES

## WORKING AS ONE COMMUNITY CARE TEAM TO IMPROVE HEALTH





# ARCHITECTURE SUPPORTING ALL SYSTEMS

UNITE US INTEGRATES WITH OTHER PLATFORMS ENSURING SEAMLESS WORKFLOWS

2-1-1



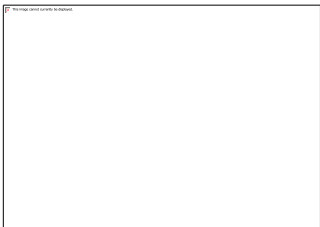
Used by +50%  
National 2-1-1  
Market

EHR's



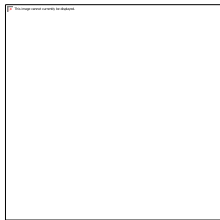
App Orchard  
&  
Health Planet Team

Community



Various tools used  
in the community

VA



Kiosks in  
VAMCs





# FROM HELLO TO OUTCOME, YOU ARE CONNECTED

## AUTOMATED WORKFLOWS WITH EXTERNAL PARTNERS AT SCALE

---



### **Configurable Screening:**

Patient and/or provider facing algorithmic screenings to stratify risk and identify specific co-occurring needs

### **Electronic Referral Management:**

Seamless referral workflow sends the right data to the right provider(s) to address specific needs

### **Assessment/Care Plan Management:**

Custom care plans for each service need that are attached to referrals so receiving providers get a head start

### **Bi-Directional Communication/Alerts:**

Automated notifications keep all organizations up to date, while care team members can securely communicate with each other

### **Outcomes:**

You get to know exactly what services were delivered, and the entire history for every intervention by your external partners



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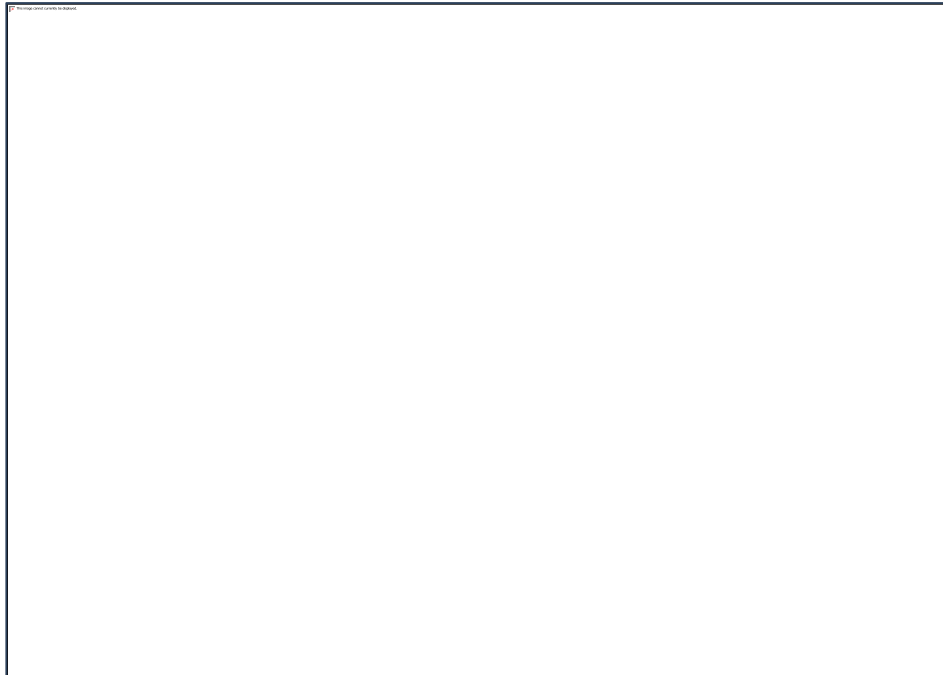
# Appendix



# THE DATA YOU NEED

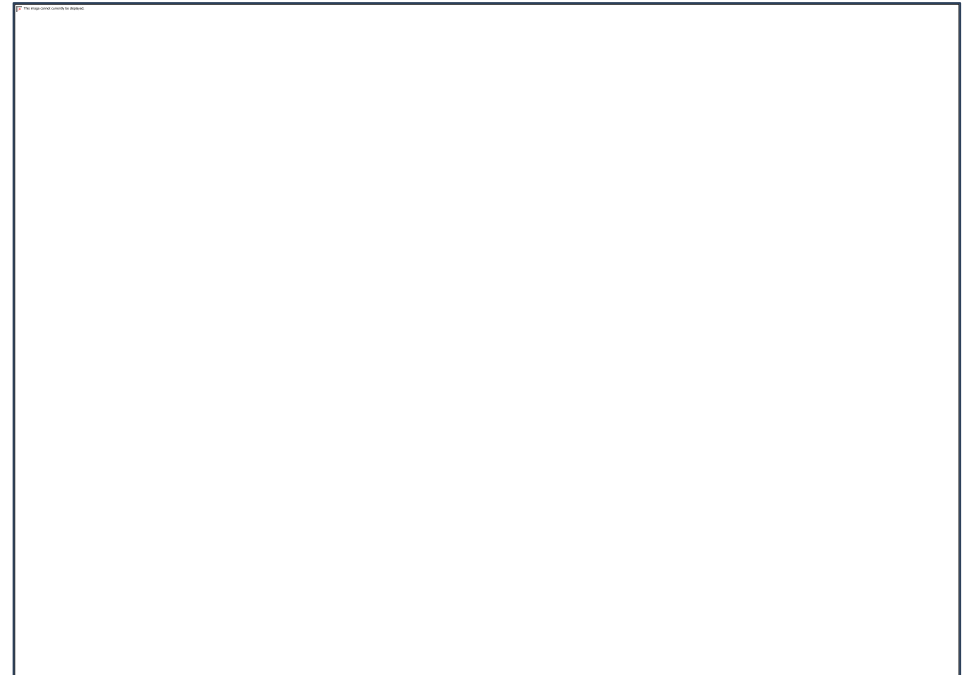
REAL-TIME REPORTING OF OUTCOMES, IMPACT, PERFORMANCE & EFFICIENCY

## Patient Level Coordination and Tracking



- Patient Demographics, Patient Access Points, Service Delivery History, Outcome Breakdowns

## Network Level Transparency & Accountability



- Service Episode history (longitudinal), Referrals Created, Received by, Structured Patient Outcomes for each specific need addressed



PROPRIETARY & CONFIDENTIAL



# CONFIGURABLE & STRUCTURED REPORTING

## GRANULAR AND DETAILED OUTCOMES FOR EVERY TYPE OF SERVICE

### Employment Service Type Example

5  
30  
198  
6  
3  
3  
ts

Close Case

×

Is Resolved? \*

Resolved

Outcome \*

Select...

Client Self-Resolved

Referred out of Network

Received Information

Employed Part Time

Employed Full Time

Received Job Training

Received Job Counseling/Coaching

Exit Date \*

07-07-2017

CANCEL

CLOSE CASE

Mart

GO TO

(2)

m

23

N

Date of

5/5/197

Race

Black/A

Ethnicit

Not His

Marital

Single/H

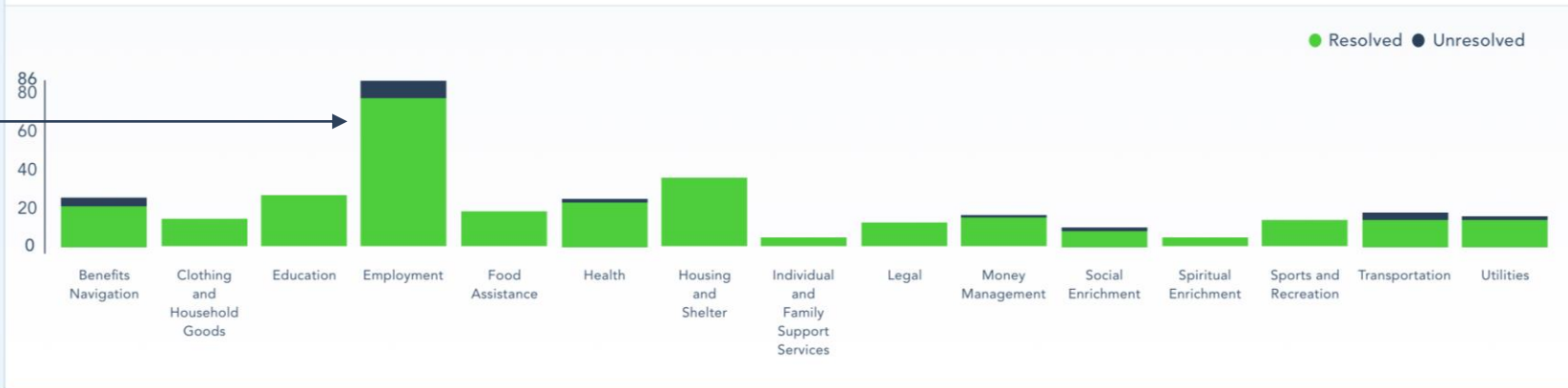
Gender

Female

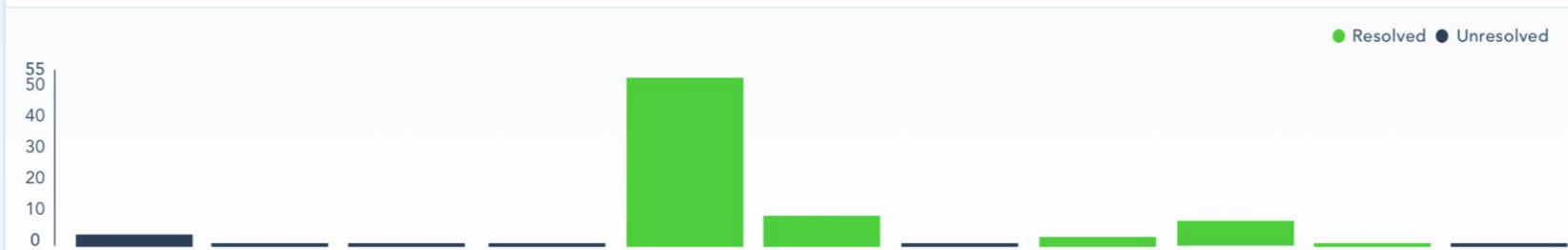
Care

Assign

Closed Cases by Resolution and Service Type



Closed Cases by Outcome for Employment





# A PATIENT JOURNEY DOESN'T ALWAYS START IN THE HOSPITAL

AS A NETWORK, EVERYONE CAN SOLVE NEEDS & TRACK OUTCOMES TOGETHER

North Carolina



34% of Electronic Referrals

are originating with Benefit Providers



17% of Electronic Referrals

are originating with Employment Providers



21% of Electronic Referrals

are originating with Social Enrichment Providers

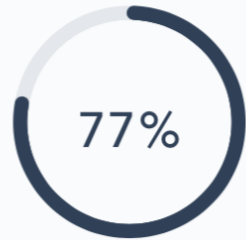
PROPRIETARY & CONFIDENTIAL



# REAL OUTCOMES AND IMPROVED HEALTH

RESOLVING NEEDS WITH A FULL FEEDBACK LOOP

The percentage of cases resolved by service category in South Carolina



Housing &  
Shelter



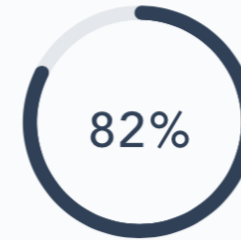
Employment



Utilities



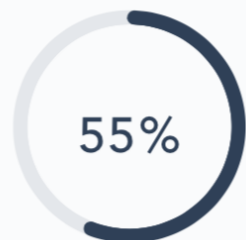
Benefits



Individual &  
Family Support



Clothing &  
Household Goods



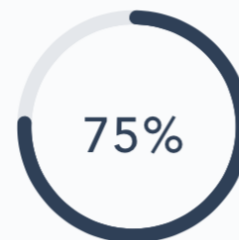
Money  
Management



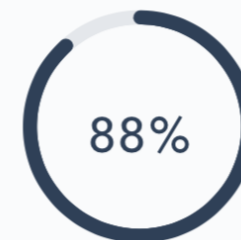
Legal



Food



Personal  
Enrichment



Transportation



Health

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# THE IMPACT OF ONE HOUSING PROVIDER

## REDUCED TIME TO HOUSE CLIENTS FROM 2 WEEKS TO 1.5 DAYS

"Unite Us has been a life saver! Receiving a referral with all of that information (**demographics, housing assessments, previous services services received**) saves us over a week and week and helps us house that client on the spot. It gets the client connected to care faster, and I can easily keep ALL partner agencies in the loop to follow client progress."

-Program Director, Alpha Project

Within 6 months, a housing provider in our San Diego network **received 81** electronic referrals through Unite Us. Since Unite Us captures structured data, we know every specific outcome achieved by providers.

90%

Accepted

7%

Rejected

3%

In Enrollment

Some examples of specific outcomes from electronic referrals:

12

Received  
Permanent Housing

9

Connected  
To Transitional Housing

7

Received  
Housing Outside of San Diego

5

Connected  
To Emergency Housing

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“  
Unite Us has removed over 85% of our administrative work and spend. That's saving 15 hours  
per week per person.”

- Pittsburgh Housing Support & Utilities provider



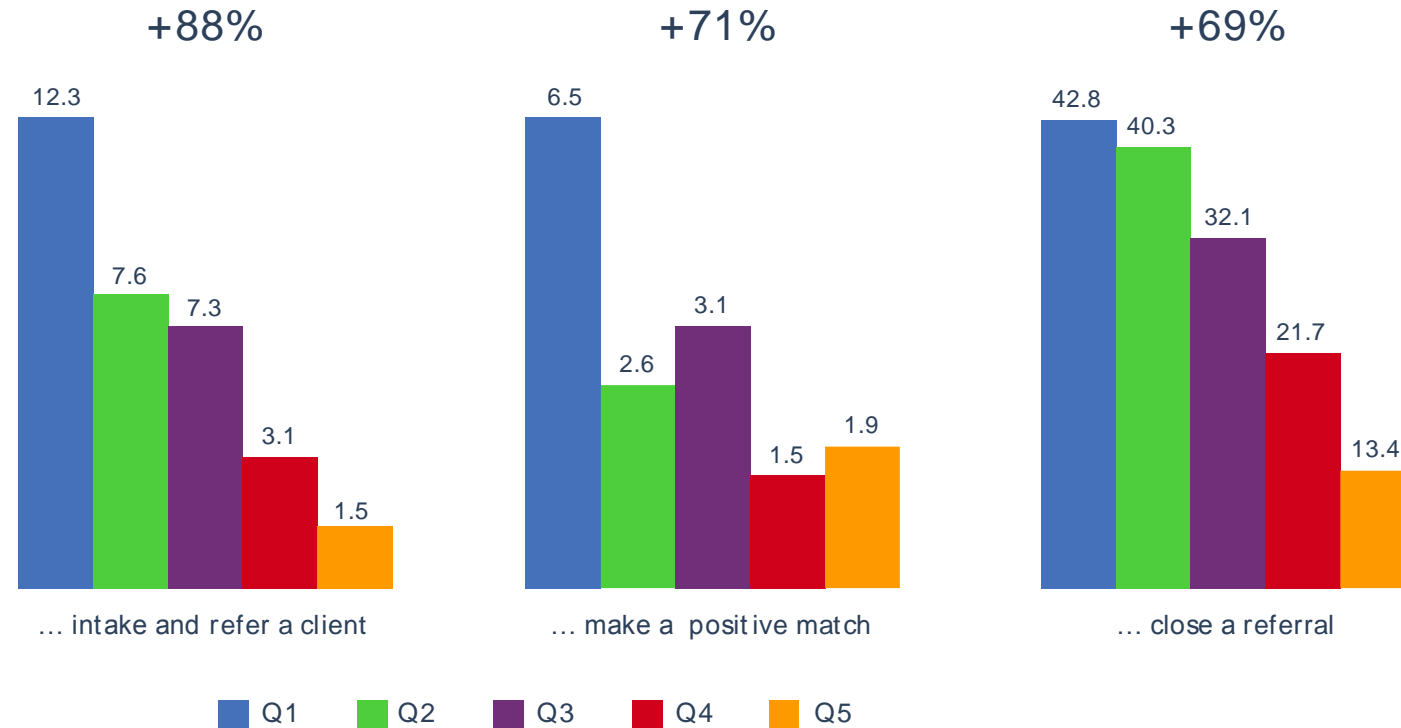
# REAL EXAMPLE OF IMPROVED EFFICIENCY

ACCELERATING INTAKE, REFERRAL, AND CLOSING THE LOOP

North Carolina Networks  
Year 1 Quarter: All Services

*Efficiency has  
increased by ...*

*Average time  
in days to ...*



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# Permissions of Patient Access and Security

## HIPAA, FERPA, FIPS COMPLIANT

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### Infrastructure

- Secured & Encrypted data at rest & in transit
- HIPAA compliant Cloud Servers (AWS)
- Unite Us provides BAA's to Covered Entities
- Audited Technical, Physical, and administrative safeguards
- Annual Penetration testing and audit by 3<sup>rd</sup> party
- 100% approved audits by local gov, state gov, and health systems/plans

### Access Controls

- Each organization is uniquely onboarded to authorize proper permissions based on services they provide
- Each user is set specific roles for viewing permissions based on specific patient access
- Each program (within an organization) is assigned specific viewing permissions (i.e. ensuring non-clinical providers cannot view clinical information)





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