

Meeting time: 9-10:30am, 4th Thursday of the month.

Meeting location: 2-1-1 Connections Center, 3860 Calle Fortunada, San Diego, CA 92123

Agencies in attendance: 2-1-1 San Diego, Child Development Associates, Blue Shield of California Promise Plan, North County Health Services, Multi-cultural Health Foundation, Community Resource Center, Fraternity House, San Ysidro Health Center, PATH, Southern Caregiver Resource Center, St Paul's PACE, San Diego Food Bank, UCSD Healthcare, YMCA Child Resource Services, Jewish Family Services, South Bay Community Services, Elderhelp of San Diego, San Diego LGBTQ Community Center. Molina Healthcare,

Welcome and Introductions

New CIE Partners

As of this month, CIE has 70 partners in the network. The newest partners are:

- Planned Parenthood
- Samahan Health Center

Recap on Care Teams and Program/Enrollments

At the CIE partner meeting in June, Roxanne Suarez, the Partner Integration Manager for the 2-1-1 CIE team walked partners through the process of enrolling clients in their programs and as well as assign themselves as care team members for their clients in the CIE partner Community. The recap on the lessons learned and the reflection results area found below:

What we learned

- We need more partners in the network
- We need more CIE partners with direct referrals
- Come up with a strategy to engage targeted partners and services

Reflection Results

- Majority said useful and helpful to learn about other partners and learn about how they can work together
- More direction of exercise
- Many partners volunteered to be part of a further conversation on how we can engage target partners

What Happens when a Client Call 2-1-1?

2-1-1 San Diego makes more than 500,000 connections each year. They have more than 150 experienced and highly trained community connectors that can connect clients to more than 1200 service providers. 2-1-1's services are confidential, available 24 hours/days a week, and offered in more than 200 languages.

When a client calls 2-1-1 they get connected to a live person that will ask you a series of questions to assess their immediate needs and based on the complexity of the call, can connect them to the services they need. For the more complex calls, Community Connectors can complete a deep assessment of the client's needs using the Social Determinants of Health Screening (SDOH). Based on the results of SDOH screening, a vulnerability score is determined for the client using our risk rating scale which ranges from stable to critical. The community connector will then offer to refer the client to the services in their domain of need and will discuss the benefits of joining CIE which includes being able to send direct referrals to participating partners in the CIE partner network. If the client hasn't consented into CIE, the connector will offer to consent them into CIE using various methods including: telephone, email, or text message.

Tyrece Ceasar, 2-1-1's call center supervisors walked the CIE partner through a client's experience when calling 2-1-1. A blurb of the process is included below:

“When a person reaches out to 2-1-1 for assistance, the first call to action is to recognize the voice on the other end of the phone {the client } is a real person, with real needs, and they are seeking options to help them through a difficult life situation. With that, Connectors are trained to display what's called the “empathy shift” and put themselves in the shoes of their client (who may have never called 2-1-1), a warm greeting and empathy allows connectors to disarm the anxiety their client may be experiencing. Remember, the client may be calling for the first time, therefore, it's kind of like the client is walking into a dark room not knowing what to expect.

We want our client(s) to feel thanked for reaching out, letting them know we hear you, and together, we can do something about it. Next, we want to provide context by adding some conversational intent, which lets the client know what to expect during the interaction. From that point, we listen actively for both the stated and unstated need. We then conduct a domain assessment based on the 14 social determinants of health. We allow the client to become informed enough to guide the situation, after all; the autonomy is up to the client. Efficiently and strategically maneuvering through Sales Force and the call, the Connector is trained to actively engage the client along the way while remembering to provide validating statements and situational empathy throughout the call.

From that point we thank the client for sharing their information and explain to the client the benefits of direct referral (if appropriate), and offer to send the referral on behalf of the client. We thank the client for calling, and let the client know “if any of the information I've given is incorrect, or, if you need to call us back, we're open 24/7”. Connectors know they {connectors} are much more than “a voice” on the other end of a phone line. Rather, they are a ray of light in a critical situation, they provide hope to the hopeless, and become a voice to the voiceless! Community Connectors understand their client is the “why” and they {the connector} strive daily to make impact and change lives one call at a time! “

CIE Engagement

The 2-1-1 San Diego CIE team, shared the FY19-20 shared their Engagement and Implementation strategy for bringing and onboarding clients into CIE. After there was a breakout activity where partners were asked about what additional prospective partners should we consider reaching out to and the values of bringing them onto CIE. Partners were also asked about what tools they have found most helpful when joining CIE. Their responses and feedback is included below.

Prospect Partners include:

- Rady's (HDS)
- Tri-City
- County (HIV Management Programs)
- Choices- Stepping Stone (substance abuse programs)
- San Diego Rapid Response
- Telecare- multitude of services/programs
- MHS
- Lift (North County) Transportation
- Moma's Kitchen- Tailored Meals
- Brother Benno's-Oceanside



CIE Partner Network Monthly Meeting Minutes July 25, 2019

- Alliance for Regional Solutions

What was most helpful to your organization from CIE team that aided in joining CIE?

Feedback below is from the perspective of implementation

- Having someone from CIE team attend management meetings to provide information to leadership and help us with strategy.
- Workflow process, understanding where CIE can be implemented
- Hands on training that benefits staff
- Availability to respond to needs as they arise
- Created user guide that staff can reference
- The reporting embedded in CIE
- Buy-in from that CIE creates more efficiency

Feedback below is from the perspective of engagement

- Pre-engagement activities
- CIE Summit helped with the "Big Picture"
- PCMH standards aligned community access, and client profile report
- SDOH
- Illustrate CIE alignment of existing MIS/CRM platforms
- CIE can help with compliance
- Increased access to resources rather than going to google and printing out resources
- Creates more efficiency

FY 2018-2019 Accomplishments

CIE has 70 partners in the network. 34 of those partners joined CIE during FY 2018-2019. 640 partners in the network have a user account and have access to the more than 98,000 clients that have consented into CIE. These users logged into the system 8,478 and completed 5,016 client searches. Of those searches, they were able to bring in results for 42% clients.

297 services in the network with direct referral functionality. During the timeframe, 3,377 referrals were made to those services. Partners accepting the direct referrals indicated that 97% of those referrals were appropriate and 67% of those resulted in a closed loop referral.

The data indicates that during the fiscal year, 13,008 program enrollments were created and that partners in the network have identified as care team members for 449 clients which allows partners to receive alerts and notifications from EMS and Jail.

Roundtable Discussion

The importance of global referrals was highlighted during the meeting.

Agencies that are using global referrals ask to mentor another agency and show them how they did it. SYHC shared their experience implementing direct referrals throughout their agency and spoke about the workflow changes they made internally to garner the support from their front-line staff.

Some of the ways they accomplish implementing CIE throughout their agency is by:

- Created "patient navigation flyers to inform patients about the benefits of consenting and CIE
- Assigning one person as the designated referral manger



- Using the Social Determinants of Health Screening as part of their workflow to connect clients to the services they need
- Implemented training team by team
- Started with looking up clients in CIE

Next Partner Meeting: August 22, 2019 from 9:00 am-10:30 pm at the 2-1-1 Connections Center, 3860 Calle Fortunada, San Diego, CA 92123.