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Webinar 5: CIE Toolkit in Depth: Cultivate Sustainability & Evolve and Shape the Movement/CIE Summit Overview

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Cultivate Sustainability

Why is it important?

- Communities need to begin developing a plan for the CIE's financial sustainability from the very early stages of the process to support the partner network and the technology platform. Government agencies and philanthropic funders have played a major role in providing communities with the initial grants and investments to create, test, and implement innovative technologies that link data from the health care, human, and social service sector to present a broader picture of health. However, these initial funding sources are often intended as start-up funding and not meant to sustain the effort.

- To ensure the CIE's relevance and viability, communities need to develop and secure financial and in-kind resources from diverse sources to guide the CIE from its start-up phase to sustainable operations.

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Action Checklist

1) Start Sustainability Discussions Early
2) Determine Sustainability Costs
3) Create Value Propositions for Key Sectors
4) Explore Different Business Models for Sustainability

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Start Sustainability Discussions Early

- Strategize and diversity funding

  - Plan for sustainability from onset, starting with discussions about the business model, partnerships, and funding required to maintain a CIE over time. Identify potential ongoing sources of funding and opportunities to write CIE development, use and upgrades into grants and contract opportunities. Create a long-term sustainability plan that provides a rationale for funding and guide sustain- ability activities and steps over time. Clearly identify and communicate a model that expects ongoing philanthropic or government support or a model that expects the CIE to be self-sustaining through member fees.

- Engage funders and communicate progress and wins

  - Invite existing and prospective funders to engage in developing the CIE, in addition to discussing long-term funding. Share the CIE's successes through various networks and collaboratives.

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Determine Sustainability Costs

- Establish a runway for multi-year capacity building

  - Determine start-up and operating costs, which include staff, technology, and legal compliance.

  - Key staff roles include a database administrator and data analysts, partner engagement managers, and development staff to secure funding and other resources.

  - A CIE should also plan for flexible funding to allow for ongoing customization of the technology platform and partner integrations. When determining these costs, a CIE should consider that partners may need support with multiple integrations over time as they upgrade their internal systems.

  - CIEs will also need either in-house or contracted legal counsel to ensure that the partner network and technology platform comply with all laws and regulations related to health care privacy, as well as information security specialists to protect individuals' data for misuse.

  - Don't underestimate the need for and cost of partner outreach, training, on-boarding, and continuous support.

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Determine Sustainability Costs

- Demonstrate impact and return on investment

  - Prepare a cost-benefit analysis for diverse prospective funders and investors to increase the likelihood of securing ongoing funding. The ROI cases need to be diverse to attract different funders.

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Create Value Propositions for Key Sectors

- Determine the value of data to inform opportunities

  - Determine how data available through the CIE can inform decision making, generate revenue, or support initiatives for each user and within each sector. Conduct research on sectors like healthcare, public health, criminal justice, education, etc. that could see value in efficiencies or opportunities to address unmet needs.

- Engage the public sector early

  - Local government entities benefit from lower care coordination costs and improved community-level health outcomes, and should be a natural partner and ongoing source of funding for a CIE. A CIE should also cultivate relationships with state and federal government and encourage them to play a role in financially sustaining community data integration efforts. Identify where there are potential cost savings and engage those potential savers in early development.

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Create Value Propositions for Key Sectors

- Engage the philanthropic sector

  - Federal, state, and local funders that support community health and well-being can provide both financial resources and insight on the issues to consider when developing a CIE. Specifically, funders can provide start-up capital, capacity building support for both the backbone organization and service providers, and even sustainable sources of funding. Funders may also be interested in partnering with a CIE on research to inform other community health-focused data sharing initiatives.

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Creating Value Propositions

In 2018, 2-1-1 San Diego drafted its CIE sustainability plan to share with key funders and partners, and has held ongoing discussions with its Advisory Board on the proposed strategy. The sustainability plan included value propositions for the different types of CIE partners—health plans, hospitals, health centers, and social service providers—as well as a business risk analysis, financial model, funding opportunities, and business metrics.

Explore Different Business Models for Sustainability

- Establish a business model and monetization strategy

    - Consider a membership model with licensing fees paid by organizations using the system. Establish fees for organizations outside the partner network to access and/or use the aggregated data to support business, policy, and research decisions.

- Continually evolve and stay abreast of changing funding climates and opportunities.

    - Leverage existing collaboratives or initiatives that need an infrastructure to work on target populations on utilizing the CIE to support.

Transform and Shape the Movement

Why is it important?

- A CIE is part of a nationwide movement to promote local and regional health health care and social service collaborations that use technology to share data with a focus on delivering person-centered care and enhancing population health.

- While the primary focus of a CIE is to nurture the local ecosystem of network partners, a CIE also can play a role in building the field of health care and social service collaborations by conducting research and sharing best practices, convening conversations and engaging influencers to shape the conversation about the role of data in understanding and addressing the impact of social determinants on population health, and championing efforts to standardize care with an eye toward achieving equity and social justice.

- To ensure that a CIE consistently incorporates best practices in health care and social service, staff need to routinely monitor the landscape and remain agile to adapt to political, economic, social, and technological trends.

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Action Checklist

1) Nurture the Regional Ecosystem

2) Build the Field

3) Shape the Conversation

4) Champion the Movement

Nurture the Regional Ecosystem

- Be agile to adjust to the environment.

  - Analyze data to better understand local needs and how current interventions are improving health. Continuously monitor the local, state, and national legislative and funding environment to better anticipate how they will shape changes to the CIE.

- Deepen relationships with the network of partners and participants.

  - Focus on opportunities to build the local and regional capacity to deliver person-centered care that produces better health outcomes while minimizing duplication of services, reducing errors, and cutting costs. Engage new partners serving diverse populations and geographic areas.

- Promote process improvement.

  - Conduct regular evaluations of the effectiveness of the partner network and technology platform to inform continuous process improvement.

CIE Development Process Evaluation

2-1-1 San Diego's leadership understands that expanding the footprint and the impact of the CIE within the San Diego region requires a growth mindset and a commitment to continuous process improvement. In 2018, the agency received funding from the Schultz Family Foundation to hire a third-party evaluator to conduct a process evaluation of the CIE's development. The process evaluation used interviews, research studies, organizational documents, and interviews with the 2-1-1 San Diego team and CIE partners to examine the quality of service delivery related to the development and implementation of a legal frame- work, community partnerships, technology, and sustainability planning. The evaluation also traced the CIE's evolution toward a broader, community health framework and a longitudinal, client record, and explored the impact of process and protocol decisions on system design, scalability, and replication. The findings and lessons learned from the process evaluation have been incorporated into the action steps that are highlighted throughout this toolkit.

Build the Field

- Conduct evaluations and research.

  - Work with partners, funders, and research institutions to conduct evaluations and research on the impact of the CIE on individuals, partners and the community.

- Share best practices.

  - Document and disseminate practices that have been proven effective through the evaluation and research process. Participate in ongoing discussions with other organizations working at the intersection of health care and social services.

- Respond to community needs and take risks.

  - Be proactive to opportunities within your community to address new challenges or needs through the CIE. Learn from past failures and see how the CIE can help to move systems change work.

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Qualitative Research on Health Care, Social Service Partnerships

2-1-1 San Diego actively participates in research that supports the development of practical resources and tools designed to foster collaboration between health care and community-based organizations (CBOs) to address social determinants of health. In 2018, the Center for Health Care Strategies and Nonprofit Finance Fund conducted qualitative research to identify common characteristics among health care-CBO collaborations. Discussion of the CIE's development was featured in a framework high- lighting common characteristics of health care-CBO collaborations, a webinar, and a case study.

Shape the Conversation

- Convene meetings and events.

  - Leverage CIE partners as thought leaders by hosting meetings, work- shops, webinars, and training on the history and development within your own community.

- Engage influencers at local, regional, state, and national levels.

  - Conduct research and outreach to engage key influencers, such as elected officials, public agency administrators, philanthropic funders, and the media, through one-on-one or small group presentations.

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Community Information Exchange Summit

- In April 2018, 2-1-1 San Diego organized a and hosted the inaugural CIE Summit, bringing together more than 350 leaders from across the nation to share ideas about how to bridge the health and social service sectors to build strong and thriving communities. The CIE Summit included keynote speakers from the U.S. Department of Health and Human Services' Office of the National Coordinator for Healthcare Information Technology, HealthBegins, Rx Democracy, and the Palo Alto Medical Foundation. Presented by 2-1-1 San Diego in collaboration with the County-led Live Well San Diego and the San Diego Health Connect HIE, the CIE Summit offered three learning tracks:

  - Bridging Data Across Sectors
  - Community Models and Practical Applications
  - Collective Impact: Sustainability and Measurement

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To continue to Inform and Shape the Movement, 2-1-1 San Diego is hosting the Second Annual CIE Summit in April 2019.

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Champion the Movement

- Shape policies.

  - Engage partners in crafting local, state, and federal policies in relevant domains based on best practices and supported by CIE data.

- Engage in advocacy.

  - Engage partners locally and in other communities to build public support for policies and funding to make CIEs the standard of care nationwide.

- Support social justice.

  - Provide data to highlight specific social determinants of health to inform communities initiatives and disparities across neighborhoods to ensure equitable access for all. Help individuals and organizations accurately interpret the data, especially as it relates to understanding how differential access to programs and services impact outcomes.

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