Strategies to Achieve Alignment, Collaboration, and Synergy Across Delivery and Financing Systems

Strengthening the Carrying Capacity of Local Health and Social Service Agencies to Absorb Increased Hospital/Clinical Referrals

Research In Progress Webinar
December 4, 2019
12:00-1:00 pm ET/9:00-10:00am PT
Agenda

Welcome: Chris Lyttle, Deputy Director for Systems for Action

Presenters: Danielle Varda, Todd Ely, Katie Edwards

Commentary: Kinsey Adamson

Q&A: Christopher Lyttle, Deputy Director for Systems for Action
Danielle Varda, PhD, is the CEO of Visible Network Labs, an Associate Professor at the University of CO Schools of Public Affairs, and the Co-Director of the CU Center on Network Science. She is a scientist turned start-up founder, with a combination of 20 years as a network scientist studying health and public health systems, social connectedness, its connection to well-being and health outcomes. Her 3 years as a RAND Corporation Policy Scientist, 11 years as a tenured professor at the UCD, a successful launch and scaling of the CU Center on Network Science, and development of the PARTNER network data and learning platform all came together in one big idea to launch VNL as a startup social enterprise. She has published over 30 peer-reviewed papers on social networks and health and well-being outcomes, is a regular trainer and keynote speaker on data-driven network strategies, and has led dozens of past and ongoing systems studies. Her proudest accomplishment is her role as the mother of three spirited girls.
Katie Edwards

The Nonprofit Centers Network. Katie Edwards is the Executive Director of The Nonprofit Centers Network, a national network of 170 nonprofit shared space centers that encompass over 3,300 nonprofits who locate together for improved impact and greater collaboration and reduced operating costs. Prior to joining NCN, she received her Masters of Public Administration with an emphasis in Nonprofit Management from Indiana University. She has researched and participated in the shared space sector for seven years, authoring several practitioner-focused publications. Ms. Edwards is responsible for managing community relationships and configuring products that will focus on translating the research for use by the shared space nonprofit community.
Todd L. Ely is an associate professor in the School of Public Affairs at the University of Colorado Denver, where he directs the Center for Local Government Research and Training. Todd’s research focuses on the financing of state and local public services, education finance, and public and nonprofit financial management. His research has been supported by the American Educational Research Association, Colorado Evaluation and Action Lab, Ford Foundation, and the Governmental Accounting Standards Board. Todd recently co-authored *Essentials of Public Service*, an introductory public administration textbook. His publications can be found in The American Review of Public Administration, Municipal Finance Journal, National Tax Journal, Nonprofit and Voluntary Sector Quarterly, Public Administration Review, Public Budgeting & Finance, Review of Policy Research, State and Local Government Review, and Urban Affairs Review. He received his PhD from the Robert F. Wagner Graduate School of Public Service at New York University.
Rachel Graham, DrPH, – University of Kentucky. Dr. Rachel Graham is an Assistant Professor in the University of Kentucky’s College of Health Sciences. She worked as a graduate research assistant in the National Coordinating Center for Public Health Services and Systems Research. She is trained in practice-focused research, and has a background in public health systems research and health services research methods training with a focus on understanding how clinical health care systems interface with public health and other non-medical organizations to deliver high quality care that addresses clinical needs alongside social needs.
Kameron Hodgens, PhD, Executive Director/CEO – The Glasser Schoenbaum Human Services Center. Dr. Hodgens has a PhD in Lifespan Developmental Psychology from the University of Alabama at Birmingham. In 2007, Dr. Hodgens became the Vice President of Programs and Services at Easter Seals Southwest Florida. In October of 2014, she joined The Glasser Schoenbaum Human Services Center as the Executive Director/CEO. Dr. Hodgens is the local lead for the case study in the Sarasota, FL site.
Kinsey works as the Operations Director for Serve Denton. She provides overall administrative support for the organization, acts as the staff liaison for each nonprofit agency officing at the Serve Denton Center, and contributes to the general development of their two nonprofit center facilities. Kinsey grew up in Denton, Texas. After graduating with a degree in Recreation, Park and Tourism Sciences from Texas A&M University, she spent two years working as the Conference and Events Intern for Cru. Kinsey is happy to be back in her hometown and is excited about working to support and enrich the Denton community.
Our Team, and How We Came Together

University of Colorado Denver
• Danielle Varda
• Todd Ely
• Becky Hofkes
• Malinda Mochizuki

University of Kentucky
• Rachel Graham

The Nonprofit Centers Network
• Katie Edwards

Serve Denton
• Pat Smith
• Carlie Kuban
• Kinsey Adamson

The Glasser Schoenbaum Human Services Center
• Kameron Hodgens
• Charlene Altenhain

Trailhead Institute
• Sarah Lampe
The project is focused on the system alignment between the medical and public health referrals to community resources as the result of increased screening on social determinants of health.

**Goals of the project are to answer:**

1) What kinds of resources and services does the nonprofit sector provide to changing health systems?

2) What is the impact on the carrying capacity of the nonprofit sector as health systems’ dependence on the sector increases?
Aims

- Aim 1 – Define “community resources” in a SDOH screening and referral systems context.

- Aim 2 – Determine which factors make up the “system” that determines the nonprofit carrying capacity of a community.

- Aim 3 – Identify the existing and potentially innovative financing mechanisms involved in integrating the delivery of hospital/clinical and public health services in a way that is equitable for all populations.

- Aim 4 – Develop strategies to prepare and build the carrying capacity of the nonprofit sector to respond to the growing demand.
Team Roles and Responsibilities: A Community Based Participatory Research Approach

- **Community Partners**
  - Context/Content Expertise
  - Community Connections
  - Info on Data Access and Availability

- **Research Partners**
  - Data Collection
  - Data Analysis
  - Analytic Model Development

- **Community/Research Partnership**
  - Interpretation of Findings
  - Translation of Findings to Practice
  - Dissemination to different audiences
THE PROBLEM WE ARE WORKING TO SOLVE
What factors are part of the “system” that determines the nonprofit carrying capacity of a community?

Current System

Community Carrying Capacity

- 60%
- 70%
- 20%
- 90%
- 40%
How are these factors impacted when a system’s SDOH screening and referral begin to increase the demand for these services in an already stressed sector?

Can This Model Inform Capacity Building:

- Hospital Community Benefit Dollars
- Local, State, Federal or Foundation Funding
- Reimbursements for Social Service Delivery
What additional complexities and factors are not as clear now, but must be considered to develop a functioning system?

People are getting stuck in before ever entering health system

People getting stuck in between home and ER/Hospital visits; never making it to community resources that could reduce returning visits

- 100%
- 90%
- 80%
Project Sites & Focus Areas

- Glasser Schoenbaum Human Services Center (Sarasota, FL)
- Serve Denton (Denton, TX)

Community Identified Project Focus Areas:
- Opioid
- Housing
METHODS
### Tasks and Timeline

<table>
<thead>
<tr>
<th>Fall 2017</th>
<th>Task 1</th>
<th>Analysis of existing dataset – looking at the role of nonprofits in cross-sector interorganizational networks</th>
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</thead>
<tbody>
<tr>
<td>Spring 2018</td>
<td>Task 2</td>
<td>Literature review to identify measures of carrying capacity</td>
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<td>Develop a preliminary/draft framework to measure carrying capacity</td>
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<td>Interview guide for key informant interviews; Scheduling interviews</td>
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<tr>
<td>Summer 2018</td>
<td>Task 2</td>
<td>Key informant interviews – Denton, TX and Sarasota, FL</td>
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<tr>
<td></td>
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<td>Interview analysis</td>
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<td></td>
<td></td>
<td>Finalizing framework based on interviews</td>
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<tr>
<td>Fall 2018</td>
<td>Task 3</td>
<td>Data Collection/Gathering: Finance data, organizational data, PARTNER survey</td>
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<tr>
<td>Spring 2019</td>
<td>Task 3</td>
<td>Analysis of the PARTNER survey (Network capacity)</td>
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<td>Analysis of available financial and program data (Financial capacity)</td>
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<td></td>
<td>Testing of this project’s carrying capacity measures framework</td>
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<td>Summer 2019</td>
<td>Task 4</td>
<td>Systems mapping – visualizing the community networks</td>
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<td>Task 5</td>
<td>Dissemination (report, highlights brief, presentations)</td>
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TASKS 3 & 4: CAPACITY MEASURES
Research Question 1:

How are cross-sector interorganizational networks of health/clinical agencies and community-based organizations implementing a screening, referral, and follow-up process?
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How are cross-sector interorganizational networks of health/clinical agencies and community-based organizations implementing a screening, referral, and follow-up process?
Research Question 1:

Perceptions of Success

How successful do you think efforts to address unmet social needs through referrals from hospitals/health systems to community organizations have been in this community?

- Very Unsuccessful
- Somewhat Unsuccessful
- Neither Successful or...
- Somewhat Successful
- Very Successful

The chart shows the percentage of responses for each category in Sarasota and Denton.
Research Question 1:

Organizations they work with to assess and refer clients to in each community.

Figure 7. Denton’s Screening and Referral Networks

Client Assessments (9%)  Client Referrals (66%)

Figure 8. Sarasota’s Screening and Referral Networks

Client Assessments (29%)  Client Referrals (60%)
Research Question 1: Role of Hospitals/Clinics

Denton’s Screening and Referral Networks

<table>
<thead>
<tr>
<th>Client Assessments (9%)</th>
<th>Client Referrals (66%)</th>
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Sarasota’s Screening and Referral Networks

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<th>Client Assessments (29%)</th>
<th>Client Referrals (60%)</th>
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Role of Hospitals/Clinics
Research Question 1:

Perceptions of Value

Denton’s Value Scores

Sarasota’s Value Scores
Factors that have the greatest impact on ability to provide social services
Financial Capacity Perspectives

Perceptions of Ability to Quickly Expand Services

Perceptions of Financial Stability

Very Stable

Stable

Somewhat Stable

Not At All Stable

Sarasota

Denton
Next Steps: Community Carrying Capacity Snapshot Tool

- A tool to help understand the capacity of a community’s nonprofit social service organizations
- Provides a framework for prioritizing community investments by looking at:
  - The financial strengths and weaknesses of nonprofit community based organizations collectively and by service area
    - Uses publicly-available IRS filings (Form 990)
  - Measures of Collaborative Capacity
    - Using networked outcome measures
Interactive tool allowing users to query a set of primary financial indicators based on

- the community of interest (whether geographic or based on specific organizations),
- service activities based on the NTEE system,
- and an optional peer community of interest for benchmarking purposes.

<table>
<thead>
<tr>
<th>Community of Interest</th>
<th>Service Focus (NTEE Codes, multiple selections allowed)</th>
<th>Peer Community of Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>Arts, Culture &amp; Humanities; Education; Environment; Animal-Related; Health Care; Mental Health &amp; Crisis Intervention; Voluntary Health Associations &amp; Medical Disciplines; Medical Research; Crime &amp; Legal-Related; Employment; Food, Agriculture &amp; Nutrition; Housing &amp; Shelter; Public Safety, Disaster Preparedness &amp; Relief; Recreation &amp; Sports; Youth Development; Human Services; International, Foreign Affairs &amp; National Security; Civil Rights, Social Action &amp; Advocacy; Community Improvement &amp; Capacity Building; Philanthropy, Voluntarism &amp; Grantmaking Foundations; Science &amp; Technology; Social Science; Public &amp; Societal Benefit; Religion-Related; Mutual &amp; Membership Benefit; Unknown</td>
<td>State</td>
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<td>County</td>
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Community Carrying Capacity Snapshot Tool

- Community financial indicator results are presented in two forms, weighted and unweighted.
  - Weighted metrics weigh the financial condition of an organization in proportion to the organization’s share of the community’s nonprofit assets.
  - Unweighted metrics treat every organization equally regardless of size.
- The selected financial indicators include measures of Surplus Generation, Resource Availability, and Solvency presented in the following table.

<table>
<thead>
<tr>
<th>Focus</th>
<th>Indicator</th>
<th>Formula</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surplus Generation</td>
<td>Three-year Operating Margin</td>
<td>Net income/Total Revenue</td>
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<tr>
<td></td>
<td></td>
<td>% of Sector with Positive Three-year Operating Margin</td>
</tr>
<tr>
<td>Resource Availability</td>
<td>Months of Reserves</td>
<td>12 * (Unrestricted Net Assets - Property, Plant, and Equipment, net of Long-Term Debt)/(Total Expenses - Depreciation)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Share of organizations exceeding 3 months of reserves</td>
</tr>
<tr>
<td>Solvency</td>
<td>Liabilities to Assets Ratio</td>
<td>Total Liabilities/Total Assets</td>
</tr>
</tbody>
</table>
As screening for SDOH increases in health and clinical settings, it is imperative that the capacity of the community resources to absorb these referrals be considered.

While hospitals are viewed positively for the value they play in these systems, community-based health and human services are still under-valued. Bringing forward the crucial role that these organizations will play in a successful system should be a key activity for stakeholders.

Elevating the value of these organizations to a successful system should be coupled with policy and funding mechanisms to support the role that community-based health and human service organizations play through innovative mechanisms, such as reimbursements for non-medical needs among client populations.

Tools for indicating levels of Community Carrying Capacity are becoming available to help align those funding and policy mechanisms to increase capacity and strengthen the whole system.
Next Steps

- Dissemination
- Web Page as a Tool

https://visiblenetworklabs.com/community-carrying-capacity-project/
Research Question 1:

Community Partners & Commentary

Glasser Schoenbaum Human Services Center (Sarasota, FL)

Serve Denton (Denton, TX)
Mission Statement: To be the leader in providing a collaborative community of high quality, accessible facilities for the local human services nonprofit sector.

Current Tenant Partner Agencies:

- AARP Foundation WorkSearch
- Bay Area Youth Services, Inc. (BAYS)
- Children’s Guardian Fund
- Coastal Behavioral Healthcare
- Early Learning Coalition of Sarasota County
- Epilepsy Services of Southwest Florida
- First Step of Sarasota
- Healthy Start Coalition of Sarasota County
- Insight Counseling Services
- Jewish Family and Children’s Services
- Literacy Council of Sarasota, Inc.
- More Too Life
- Babies & Children’s Medical Center, Sarasota County Health Dept.
- The Salvation Army, Quality Life Center
- Sarasota County Openly Plans for Excellence (“SCOPE” – as of 3/01/18)
- Suncoast Partnership to End Homelessness
- UnidosNow
2016 Campus Facts, Figures, & Impact

• 17 Agencies - 14 buildings - 5 acres – 1 campus
• Tri-county reach: Sarasota, Manatee, & DeSoto
• Home to 56 agencies during our 28 years
• 48,000 square feet of office space
• Served over 45,500 individuals
• $8.50/square foot/year
• All overhead & maintenance expenses included (except phone & Internet)
• $15 million in overhead saved since 1990
• $16.9 million dollars in 92 programs
• 117 full time staff, 32 part time
• 770 volunteers
• Approximately $500,000 saved annually
Who is Serve Denton?

Mission

Serve Denton partners with nonprofits to help make THEIR services more accessible for people in need.

Locations


The Wheeler House
The Wheeler House is a 4,000 square foot transitional housing facility for moms and their kids. Opening July 2015, The Wheeler House has served over 100 moms and their kids.

Serve Denton Center
The Serve Denton Center is a 32,500 square foot building that can accommodate multiple nonprofit service providers in one convenient location for an affordable price, so those in need only have to visit one location to receive help.

Vision

- Serve Denton strives to be a one-stop-shop for social services.
- Fill all 19 rungs on our Self Sufficiency Ladder by having a nonprofit address each issue.
- Improve collaboration amongst nonprofits by officing in one location.
- Create opportunities for people to become self-sufficient by providing accessible services in one location.
Our 17 Nonprofit Partners

The Wheeler House

Serve Denton Center
Questions?

www.systemsforaction.org
Acknowledgements

*Systems for Action* is a National Program Office of the Robert Wood Johnson Foundation and a collaborative effort of the Colorado School of Public Health, Health Systems, Management & Policy Department in Aurora, Colorado.