



*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.



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 was 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 Hodgins
- Charlene Altenhain

Trailhead Institute

- Sarah Lampe

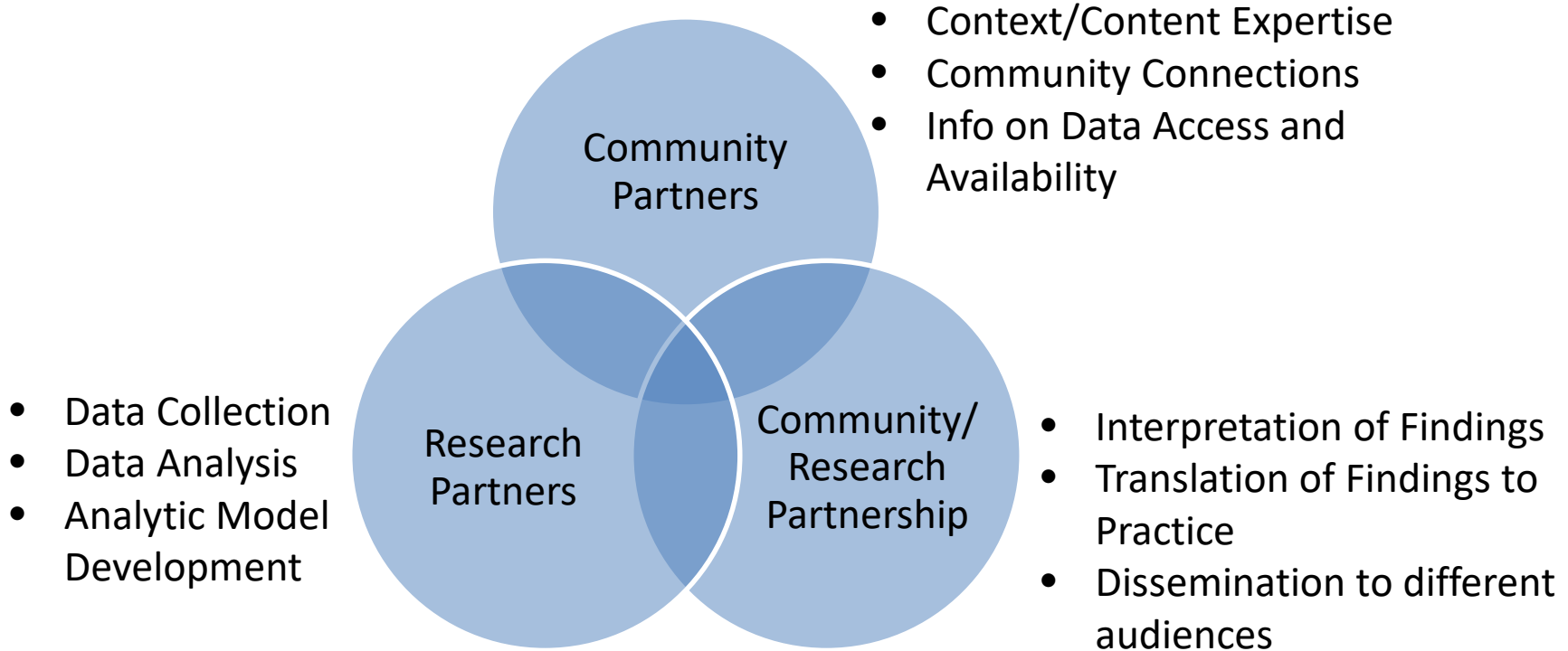
The project is focused on the system alignment between the medical and public health referrals to community resources as the result of increased screening on social determinants of health.

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?

- 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.

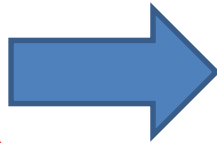
Team Roles and Responsibilities: A Community Based Participatory Research Approach



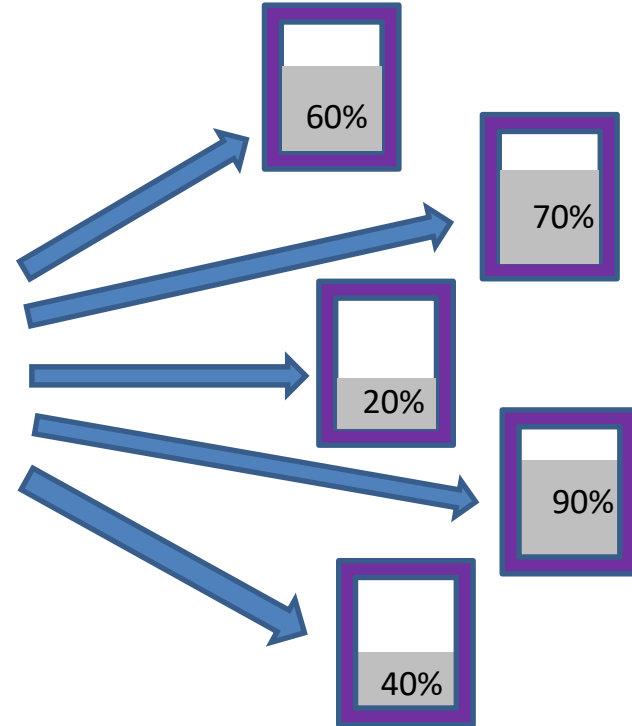
THE PROBLEM WE ARE
WORKING TO SOLVE

What factors are part of the “system” that determines the nonprofit carrying capacity of a community?

Current System



Community Carrying Capacity



60%

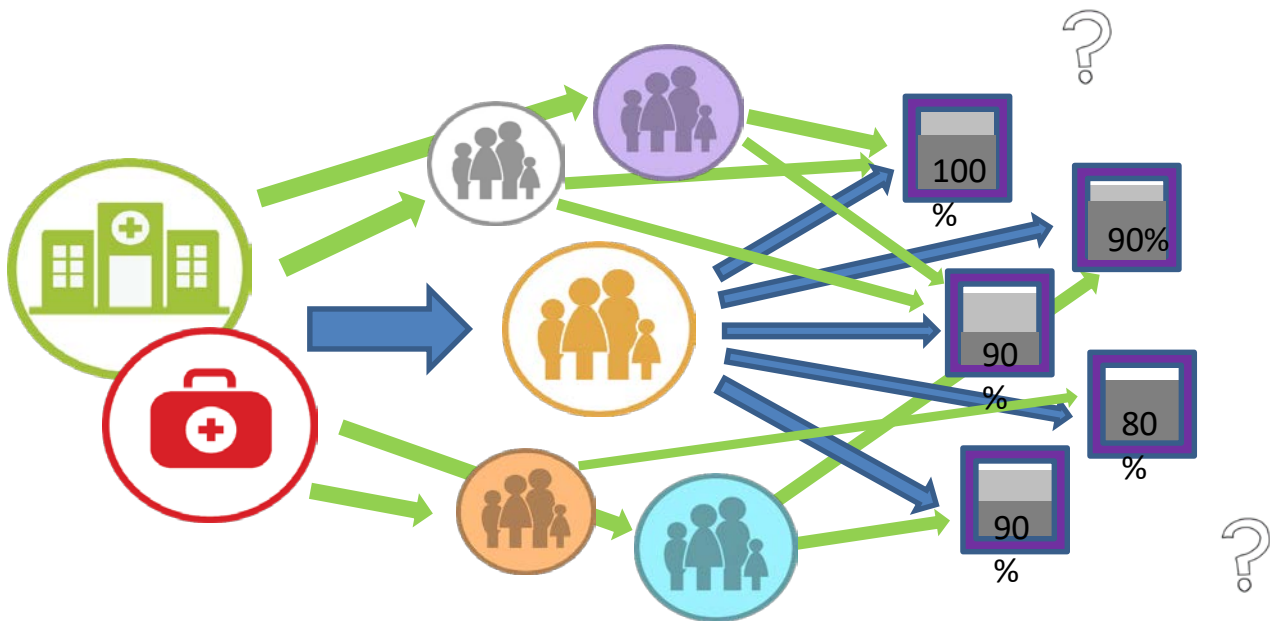
70%

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?



➤ **Glasser Schoenbaum Human Services Center (Sarasota, FL)**



➤ **Serve Denton (Denton, TX)**



Community Identified Project Focus Areas:

- **Opioid**
- **Housing**

METHODS

Tasks and Timeline

Fall 2017	Task 1	<ul style="list-style-type: none">▪ Analysis of existing dataset – looking at the role of nonprofits in cross-sector interorganizational networks
Spring 2018	Task 2	<ul style="list-style-type: none">▪ Literature review to identify measures of carrying capacity▪ Develop a preliminary/draft framework to measure carrying capacity▪ Interview guide for key informant interviews; Scheduling interviews
Summer 2018	Task 2	<ul style="list-style-type: none">▪ Key informant interviews – Denton, TX and Sarasota, FL
Summer 2018	Task 2	<ul style="list-style-type: none">▪ Interview analysis▪ Finalizing framework based on interviews
Fall 2018	Task 3	<ul style="list-style-type: none">▪ Data Collection/Gathering: Finance data, organizational data, PARTNER survey
Spring 2019	Task 3	<ul style="list-style-type: none">▪ Analysis of the PARTNER survey (Network capacity)▪ Analysis of available financial and program data (Financial capacity)▪ Testing of this project's carrying capacity measures framework
Summer 2019	Task 4 Task 5	<ul style="list-style-type: none">▪ Systems mapping – visualizing the community networks▪ Dissemination (report, highlights brief, presentations)

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?

Figure 3. Referral Network - Denton

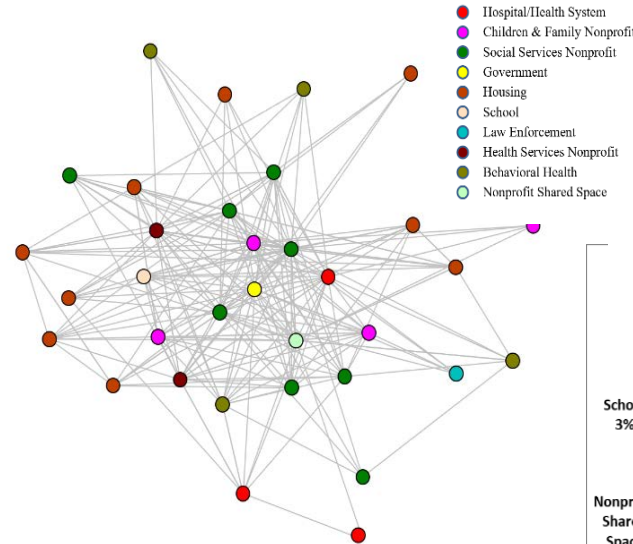
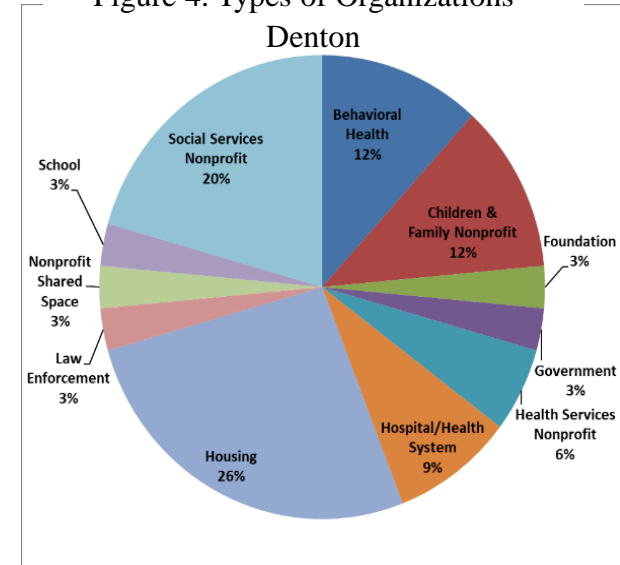


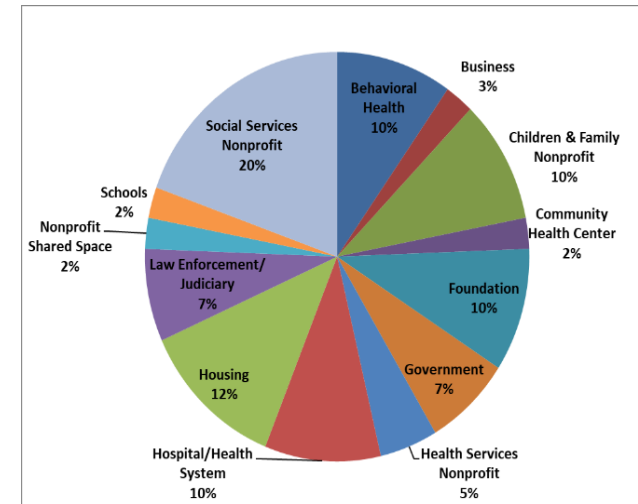
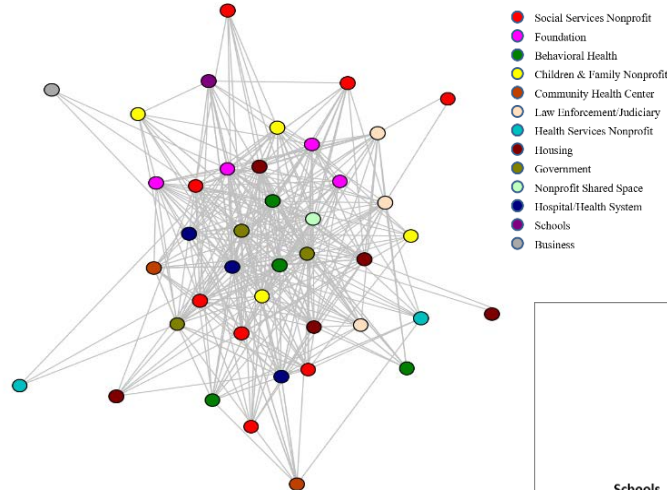
Figure 4. Types of Organizations - Denton



Research Question 1:

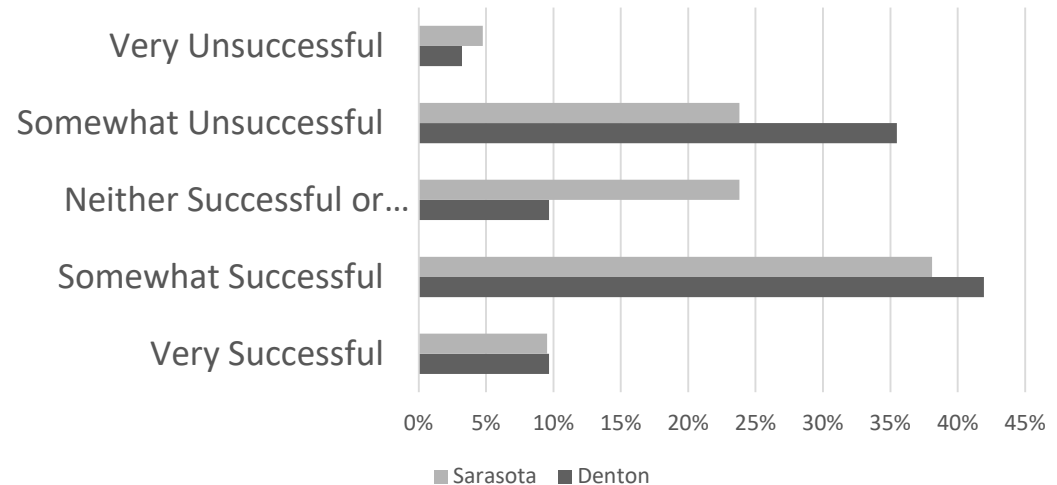
How are cross-sector interorganizational networks of health/clinical agencies and community-based organizations implementing a screening, referral, and follow-up process?

Figure 5. Description of a Network - Sarasota Map



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?



Research Question 1:

Figure 7. Denton's Screening and Referral Networks

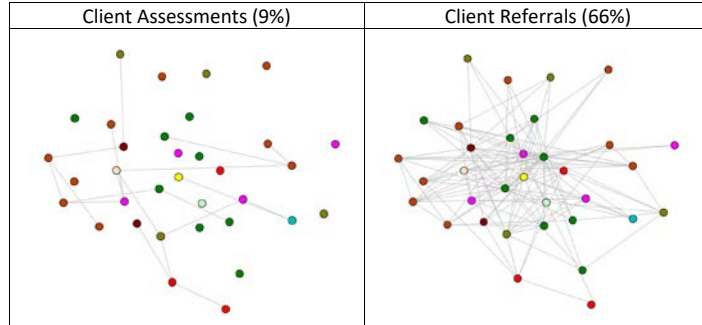
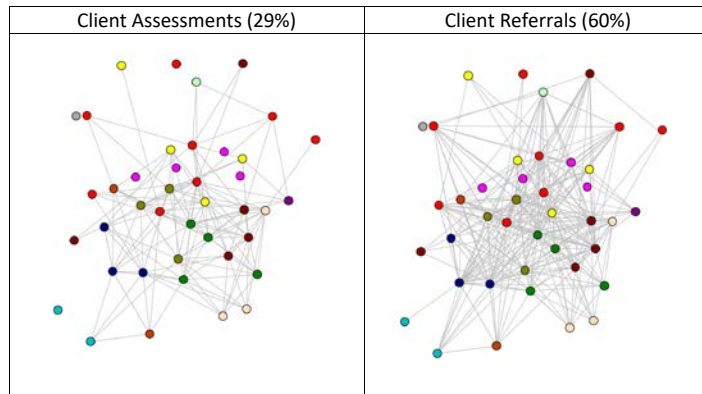


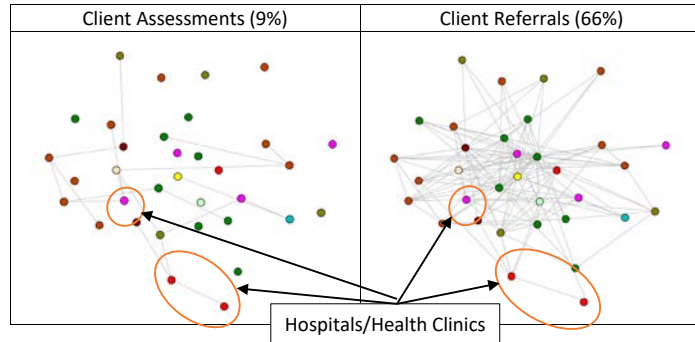
Figure 8. Sarasota's Screening and Referral Networks



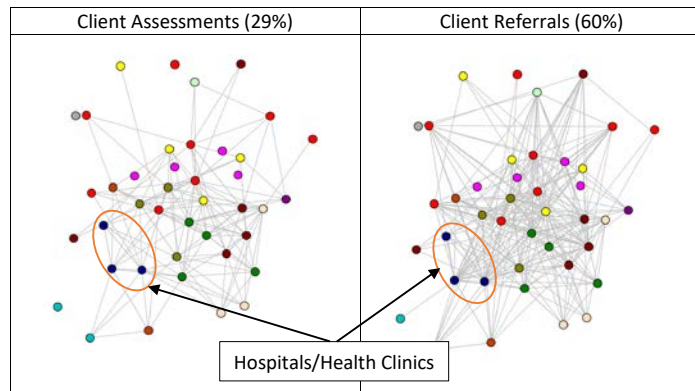
Organizations they
work with to assess
and refer clients to in
each community.

Research Question 1:

Denton's Screening and Referral Networks



Sarasota's Screening and Referral Networks

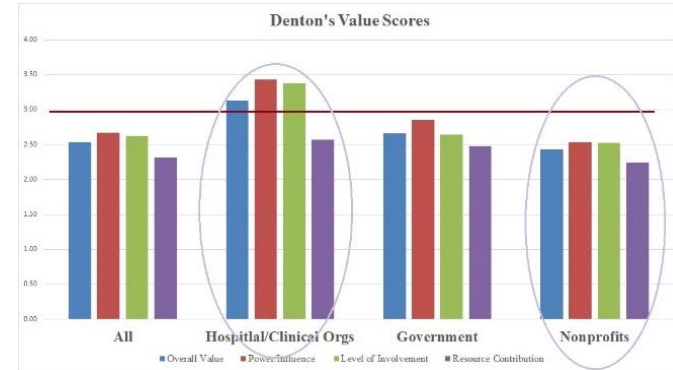


Role of
Hospitals/Clinics

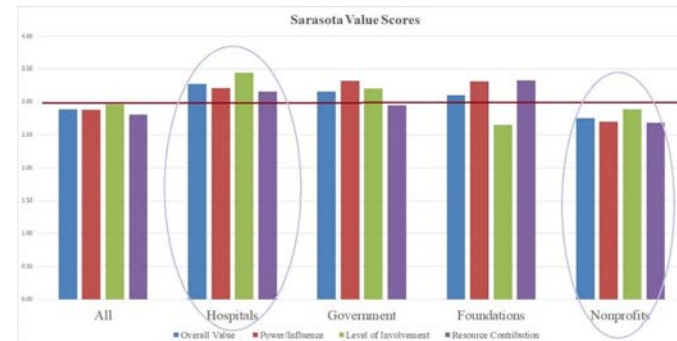
Research Question 1:

Perceptions of Value

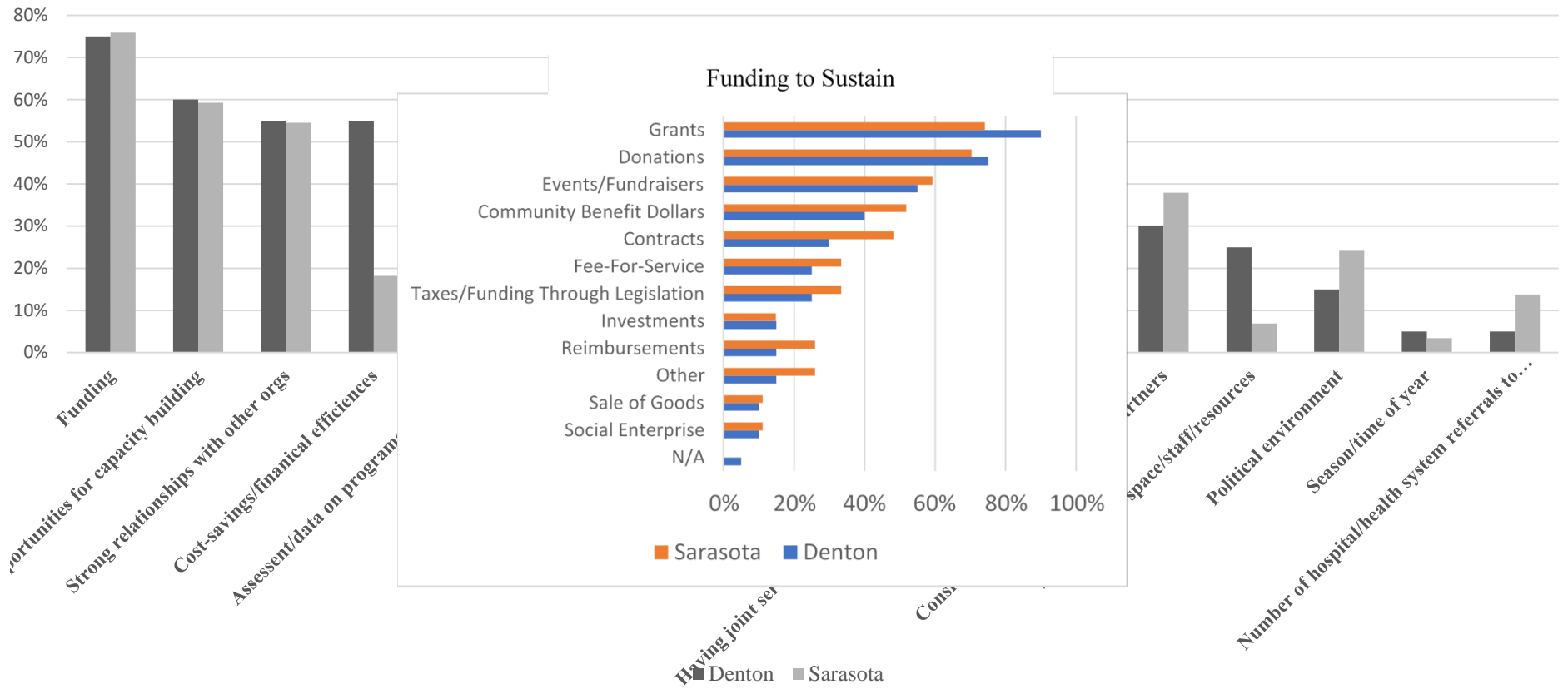
Denton's Value Scores



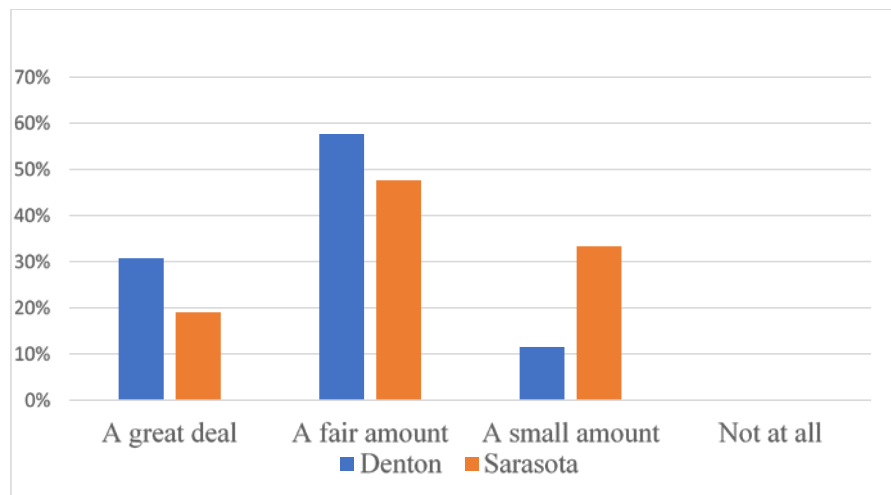
Sarasota's Value Scores



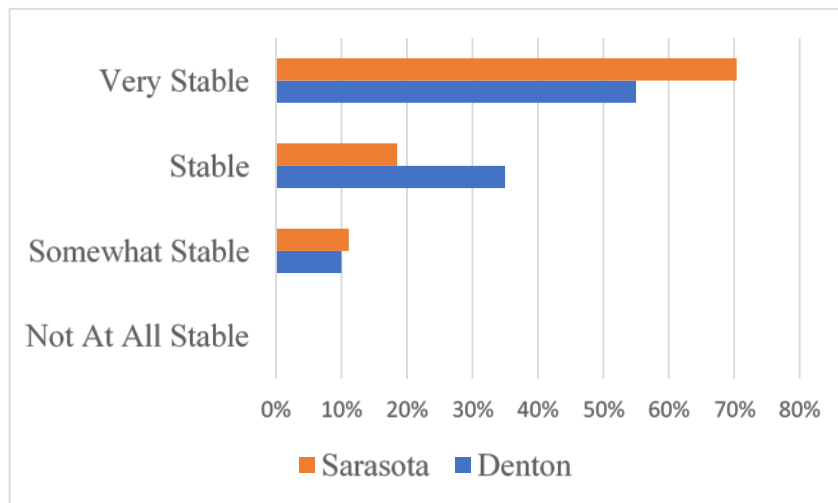
Factors that have the greatest impact on ability to provide social services



Perceptions of Ability to Quickly Expand Services



Perceptions of Financial Stability



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

Community Carrying Capacity Snapshot Tool:

Financial Data

- 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.

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

- 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.

Focus	Indicator	Formula
Surplus Generation	Three-year Operating Margin	Net income/Total Revenue % of Sector with Positive Three-year Operating Margin
Resource Availability	Months of Reserves	12 * (Unrestricted Net Assets - Property, Plant, and Equipment, net of Long-Term Debt)/(Total Expenses - Depreciation) Share of organizations exceeding 3 months of reserves
Solvency	Liabilities to Assets Ratio	Total Liabilities/Total Assets

- 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.

- Dissemination
- Web Page as a Tool



- <https://visiblenetworklabs.com/community-carrying-capacity-project/>

Community
Partners

& Commentary

**Glasser Schoenbaum Human Services Center
(Sarasota, FL)**



Serve Denton (Denton, TX)





1750 17th Street
Sarasota, FL 34234
(941) 365-4545
www.gs-humanservices.org

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

Serve Denton owns and operates two properties:
The Wheeler House and the Serve Denton Center.

The Wheeler House

The Wheeler House is a 4,00 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

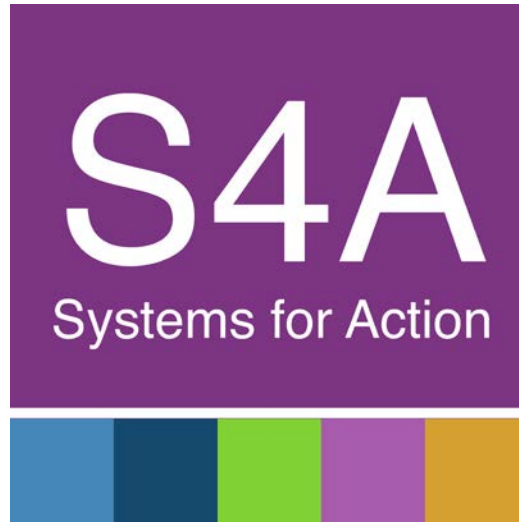
The Wheeler House



Serve Denton Center



Questions?



www.systemsforaction.org

Acknowledgements

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colorado school of
public health

UNIVERSITY OF COLORADO
COLORADO STATE UNIVERSITY
UNIVERSITY OF NORTHERN COLORADO

and

Health Systems, Management & Policy
colorado school of public health